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Jobber topics

AN IRVING-CLOUD PUBLICATION

48th ANNUAL MARKETING DIRECTORY ISSUE

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Industry Health-Check Shows Improving Sales

"How's Business" study finds both "dollar" and "unit" sales stronger than last year. Among market groups, repair shops have gained edge over DIY . . .

By BILL ELLIS
Managing Editor

Once a year, JOBBER TOPICS takes out its "stethoscope" to make several soundings on the general health of the automotive wholesaling industry.

Ellis

The "stethoscope" is a "How's Business" survey, which we expand from its brief monthly form to an in-depth affair with six questions.

JOBBER TOPICS' study covers wholesalers in city, suburban and rural settings, in different sales volume groups, and in every conceivable type of socio-economic context, from industrial areas, to lumbering and mining communities, to farming regions and vacation environments.

This year—following the pattern of previous years—the survey asked respondents to compare the first two months of 1982 with the first two months of 1981. The purpose was to gain a picture of just where the industry stands as it faces off into the third and fourth quarters.

The actual survey questionnaire, sent by mail, asked panelists to indicate whether three different indexes were "up," "down," or "about the same." The indexes were dollar sales, unit sales and collections. In question No. 4, the survey asked which class of trade contributed most to improved sales, if indeed they had improved. Question 5 asked for a "better," "worse," or "same" reading on the respondent's cash position. And question 6 asked whether economic conditions in the respondent's area were "improving," "getting worse" or "about the same."

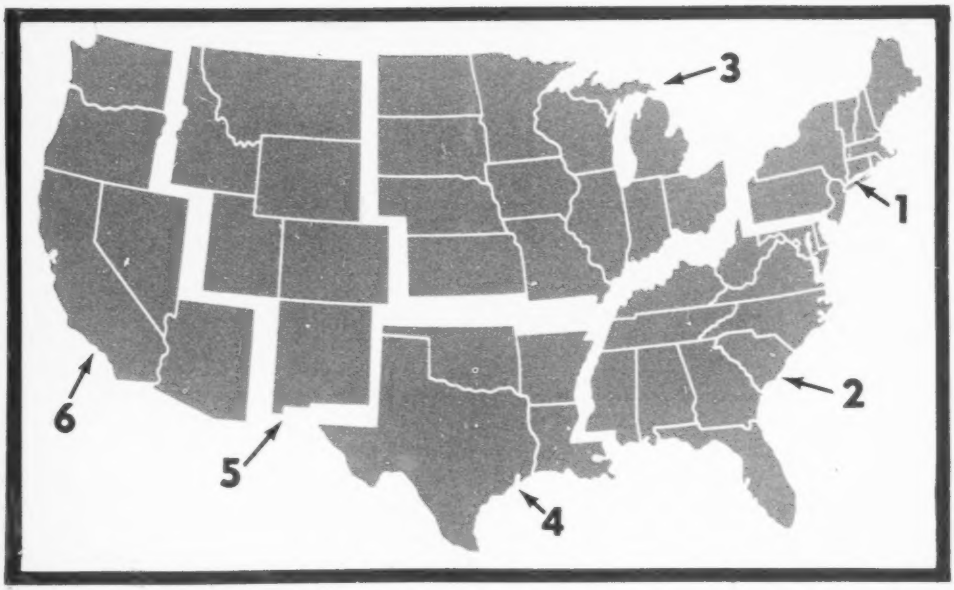
In computing the survey, JOBBER TOPICS sorted replies into six geographic groups. This enhanced the analysis greatly since some parts of the U.S. have been hit hard by the recession while others have been relatively well off.

The six geographic areas, together with the states they include, are as follows:

Region 1 (Northeast): CT, ME, MA, NH, NJ, NY, PA, RI and VT.

Region 2 (Southeast): AL, DE, DC, FL, GA, KY, MD, MS, NC, SC, TN, VA, and WV.

Region 3 (Central): IL, IN, IA, KS, MI, MN, MO, NE, ND, OH, SD, and WI.



This map of the U.S. shows the six regions used for reporting purposes in our "How's Business" survey. Region 6 includes Alaska and Hawaii as well as the five states shown.

Region 4 (South): AR, LA, OK and TX.

Region 5 (West): CO, ID, MT, NM, UT, and WY.

Region 6 (Far West): AK, AZ, CA, HI, NV, OR, and WA.

National figures in the survey, those embracing all six geographic groups, provided grounds for optimism. Over 51 percent of the firms said dollar sales were up. That compared to 45.4 percent last year. Unit sales, too—those figures wrung dry of inflationary influence—also looked encouraging. Over 35 percent confided that unit sales were up. That cast a good shadow over last year's finding of 24.1 percent.

"Repair shops" came out from behind "Do-it-yourself business" to regain dominance—by a whisker—as the class of trade contributing most to improved sales. Of the total respondents (935 firms), 15.6 percent named repair shops as their top customers, while 15.2 percent said do-it-yourselfers. The figures were in stark contrast to last year, when the do-it-yourself category garnered an overwhelming number of top mentions.

Collections, unsurprisingly, offered no cause for celebration. Only 11.3 percent said they were "up" while 34.2 percent said "down" and 54.5 percent reported them "about the same."

Cash position, linked inextricably to collections, reflected a similarly somber picture. "Better," reported only 19.6 percent; "worse," said 26.2 percent; and "about the same," said 54.2 percent.

A veritable chorus of respondents—53.4 percent—said their local economic conditions were "getting worse." That left a bare whisper of voices—7.6 percent—who said things were "improving," and 39 percent who said they were "about the same."

Comparing the first two months of 1982 to the first two of 1981, were your unit sales up, down, or about the same?

(Percent total respondents)

	Reg. 1	Reg. 2	Reg. 3	Reg. 4	Reg. 5	Reg. 6	All Groups
Up	33.5	28.0	40.7	37.8	45.0	30.2	35.1
Down	31.4	37.1	24.5	32.2	27.5	34.9	30.9
Same	35.1	34.9	34.8	30.0	27.5	34.9	34.0
	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Average percent "Up"	11.9	12.3	11.5	12.0	10.1	18.0	12.4
Average percent "Down"	10.8	11.2	12.9	13.6	12.4	12.6	12.1

National statistics help to keep one's perspective in proper adjustment. However, it's the regional facts of life (as well as the local) that one must live with day in and day out. So let's take a look now at how the six geographic regions shaped up. Our commentary will be brief, due to limited space. For more amplification, consult the tables.

Region 1 (Northeast)—Feedback from the highly-impacted Northeast left little to cheer about. The "up" or "better" figures for dollar sales, unit sales and cash position were all below national percentages. The question about the local business environment elicited an "improving" response from only 4.4 percent.

A New Hampshire jobber warned, "1982 will be a fight for survival. Anyone who is over-extended and doesn't have a strong cash position will have a difficult year."

Region 2 (Southeast)—Jobbers cited slowdowns in textiles, pulp wood, tourist trade and construction for infirm economic health in Region 2.

In collections and cash position, the Southeast pretty much echoed the national readings, except that 41.3 percent said collections were "down" vs. 34.2 percent for the nation at large. It was in dollar and unit sales that the Southeast nosed downward, downward that is, in reference to national figures. Only 43.2 percent reported dollar sales were "up," and 28 percent said unit sales were "up." Both indicators were down roughly seven percentage points from the national profile.

Region 3 (Central)—Despite plant closings and layoffs in Michigan and

Comparing the first two months of 1982 to the first two of 1981, is your cash position better, worse, or about the same?

(Percent total respondents)

	Reg. 1	Reg. 2	Reg. 3	Reg. 4	Reg. 5	Reg. 6	All Groups
Better	18.9	21.3	19.0	23.1	13.6	18.6	19.6
Worse	26.9	27.1	24.4	24.0	25.0	30.5	26.2
Same	54.2	51.6	56.6	52.9	61.4	50.9	54.2
	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Comparing the first two months of 1982 to the first two of 1981, were your dollar sales up, down, or about the same?

(Percent total respondents)

	Reg. 1	Reg. 2	Reg. 3	Reg. 4	Reg. 5	Reg. 6	All Groups
Up	46.1	43.2	60.3	51.9	57.8	48.3	51.1
Down	23.0	33.1	18.7	22.6	24.4	39.8	26.0
Same	30.9	23.7	21.0	25.5	17.8	11.9	22.9
	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Average percent "Up"	17.1	11.5	13.9	14.2	12.5	17.3	14.4
Average percent "Down"	12.0	11.9	13.2	16.5	13.6	13.2	13.0

other auto-related states, the nation's heartland displayed surprising renewal. Over 60 percent of the panelists said dollar sales were "up." Nearly 41 percent said unit sales were "up," and 12.2 percent reported collections "up." Paradoxically, only 5.8 percent claimed their local economies were improving, a low exceeded only by that in the Northeast.

Region 4 (South)—Although still above national performance in dollar and unit sales—but just barely—Region 4 has lost the strong position it had last year. The relaxation, however, may be only temprary. Nearly 15 percent of the survey participants said economic conditions in their area were improving.

As was true in 1981, the South scored well in both collections and cash position. The number of firms reporting collections "up" (15.2 percent) and cash position "better" (23.1 percent) exceeded the number in any other geographic region.

Region 5 (West)—The old bromide which says a sale is never made until the bill is paid is brought to mind by circumstances in Region 5. There, both dollar sales and unit sales are strong, the

(Continued on page 114)

Comparing the first two months of 1982 to the first two of 1981, were your collections up, down, or about the same?

(Percent total respondents)

	Reg. 1	Reg. 2	Reg. 3	Reg. 4	Reg. 5	Reg. 6	All Groups
Up	11.3	12.2	12.2	15.2	6.7	6.8	11.3
Down	33.0	41.3	32.0	30.3	35.6	32.2	34.2
Same	55.7	46.5	55.8	54.5	57.7	61.0	54.5
	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Average percent "Up"	11.2	11.9	16.1	14.1	*	15.3	13.6
Average percent "Down"	13.3	15.0	13.6	14.7	9.7	14.3	13.9

*Insufficient response

Health-Check . . .

(Continued from page 89)

latter exceeding percentages in all other geographic groups. Yet collections and cash positions are weak. Only 6.7 percent, fewer than in any other region, said collections were "up." And a paltry 13.6 percent, another all-group low, reported "better" cash positions.

In some ways the West is throbbing with economic activity. Coal, oil and uranium mining are proceeding apace. Central city construction is evident in Denver, Salt Lake City, Boise and Albuquerque. Yet business prospects through the eyes of jobbers are not all that great. Only 8.9 percent saw economic conditions "improving," while 48.9 percent looked for them to get "worse." Lamented one wholesaler: "Employment at Colorado Fuel & Iron is down. The meat packing plant is out of business.

Region 6 (Far West)—In neither dollar sales nor unit sales did the Far West distinguish itself. Only 48.3 percent of the panel said dollar sales were "up," and 30.2 percent reported unit sales "up."

Collections, reported "up" by 6.8 percent, were only one-tenth of one percent better than the bottom-ranked West. Cash position, judged "better" by just 18.6 percent, was likewise relatively soft.

Two Far West jobbers commented on the recession-born trend to keep older cars on the road. "Older cars are literally being resurrected out of junkyards," said a California wholesaler. "Inventory for the older clunkers is not always easy to get but people are patient about it." Then from Washington came this observation: "It seems like more of the people who bought tires and wheels from us have also started installing engines and transmissions in their older vehicles—rather than buying a brand new automobile."

That the Far West comments are not isolated cases is borne out by a recent R.L. Polk & Co. report that the median age of the 106 million domestic cars in the U.S. has increased in a decade from 4.9 years to 6.0 years—the highest since the 1950s.

If sales were up, which class of trade contributed most to your increase?

(Percent total respondents)

	Reg. 1	Reg. 2	Reg. 3	Reg. 4	Reg. 5	Reg. 6	All Groups
Repair shops	12.3	13.1	20.2	13.2	22.2	14.4	15.6
Do-it-yourself business	11.3	11.0	20.2	12.3	17.8	18.6	15.2
Service stations	10.8	6.3	15.8	3.8	6.7	2.5	9.3
Car dealers	2.5	4.2	4.0	4.7	8.9	2.5	3.9
Fleets	1.0	3.2	0.4	5.7	0.0	0.9	1.6
Other	2.0	3.2	2.6	11.3	0.0	3.4	3.5
Percent reporting dollar sales "up"	46.1	43.2	60.3	51.9	57.8	48.3	51.1
No answer	15.7	15.8	9.9	12.3	15.6	12.7	13.3
	*	100.0	*	*	*	*	*

*Totals over percent due to multiple mentions.

AUTOMOTIVE STATISTICS

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Unit Sales by Median Jobbers Of Selected Product Lines

Line	Unit Sales Per Month of Median Jobber (1980-81) Type A Jobber*	Type B Jobber**
Alternators (New and remanufactured)	24	25
Batteries	30	20
Brake Lining Sets	65	70
Cables:		
Battery	50	50
Spark Plug	48	40
Carburetors (New and Remanufactured)	12	15
Clamps	300	200
Exhaust System Parts:		
Mufflers	50	30
Pipes	85	50
Filters:		
Air	150	120
Fuel	110	75
Oil	300	100
Fuel Pumps	36	32
Gasket Sets:		
Complete Overhaul	10	8
Valve Grind	20	15
Grease (Measured in Pounds)	100	50
Hoses	100	55
Ignition Parts:		
Breaker Points/Condensers	200	125
Coils	20	15
Distributor Caps/Rotors	52	50
Ignition Switches	16	15
Oil (Measured in Cases)	35	25
Piston Ring Sets	10	5
Sealed Beams	84	40
Shock Absorbers	60	35
Spark Plugs	1,400	800
Starter Drives	18	25
Suspension Parts:		
Ball Joints	20	10
Idler Arms	12	10
Tie Rod Ends	20	15
V-Belts	150	100
Water Pumps	30	25
Wheel Bearings/Oil Seals	65	55

*Group A Jobbers have retail sales of item listed that account for less than 50 percent of that item's total sales. **Group B Jobbers have retail sales of item listed that are greater than 50 percent of that item's total sales.

Source: Market PROBE reports—Irving-Cloud Publishing Co.

Scope of the Automotive Service Industry—In Brief

Category	Number
Motor vehicle & equipment manufacturers	3,725[1]
Automotive production remanufacturers	1,412[2]
Manufacturers' merchandise agents and brokers selling automotive parts and supplies (i.e., manufacturers' agents) (1977)	940[3]
Manufacturers' sales branches and sales offices selling automotive parts and supplies (1977)	701[3]
Merchant wholesalers of automotive parts and supplies	28,956[4]
Gasoline service stations (qualified for repair and service work)	105,665[5]
Automobile repair shops (1977)	154,194[3]
Passenger car dealers (1982)	29,044[6]
Truck dealers (1982)	13,921[6]
Fleets (of 10 or more vehicles; equipped to perform maintenance) (1981)	45,647[7]
National trade associations and industry groups (1982)	88[8]
State and regional (multi-state) trade associations (1982)	39[8]

Some Industry Sales Figures

Sales of merchant wholesalers of automotive parts and supplies (1981)	$ 33 billion[9]
Automotive parts and service sales at retail (1981)	75 billion[10]
Total automotive retail sales (1981)	290 billion[9]

Source: [1]MVMA's *Motor Vehicle Facts & Figures '81*. [2]Estimate from the Automotive Parts Rebuilders Association, Inc. [3]U.S. Census of Business (1977). [4]JOBBER TOPICS (Sept. 1981). [5]SUPER SERVICE STATION (April 1982). [6]R. L. Polk & Co. Further reproduction prohibited without Polk permission. [7]Heavy Duty Market Probe (Irving-Cloud Publishing Co.) [8]JOBBER TOPICS' 1981 July Marketing Directory. [9]U.S. Dept. of Commerce. [10]National Automobile Dealers Association.

1981 Automotive Parts and Service Market: $75 Billion

Estimated Total Automotive Service Market (1981)	$75.0 Billion
Franchised New Car and Truck Dealers	23.4 Billion
Automotive Repair Shops	19.8 Billion
Gasoline Service Stations	6.4 Billion
TBA Dealers	16.7 Billion
Mass Merchandisers	6.8 Billion
All Others	1.9 Billion

Source: Economic Analysis Department, National Automobile Dealers Association.

State-by-State Look

State	Car Registration[1]	Truck & Bus Registration[1]	Total Registration[1]	Wholesaling Outlets[2]
Ala.	2,140,000	886,000	3,026,000	559
Alaska	158,000	101,000	259,000	42
Ariz.	1,458,000	589,000	2,047,000	332
Ark.	1,072,000	558,000	1,630,000	431
Calif.	14,019,000	3,725,000	17,744,000	2,461
Colo.	1,765,000	605,000	2,370,000	467
Conn.	2,022,000	167,000	2,189,000	383
Del.	324,000	78,000	402,000	82
D. of C.	257,000	22,000	279,000	36
Fla.	6,398,000	1,484,000	7,882,000	1,273
Ga.	2,938,000	912,000	3,850,000	794
Hawaii	525,000	57,000	582,000	85
Idaho	531,000	330,000	861,000	180
Ill.	6,390,000	1,250,000	7,640,000	1,357
Ind.	2,900,000	959,000	3,859,000	807
Iowa	1,670,000	661,000	2,331,000	611
Kan.	1,404,000	634,000	2,038,000	476
Ky.	1,813,000	791,000	2,604,000	556
La.	2,016,000	847,000	2,863,000	508
Maine	525,000	219,000	744,000	192
Md.	2,393,000	464,000	2,857,000	367
Mass.	3,320,000	489,000	3,809,000	648
Mich.	5,326,000	1,256,000	6,582,000	1,081
Minn.	2,345,000	797,000	3,142,000	492
Miss.	1,269,000	366,000	1,635,000	384
Mo.	2,447,000	846,000	3,293,000	852
Mont.	455,000	268,000	723,000	159
Neb.	849,000	431,000	1,280,000	312
Nev.	492,000	195,000	687,000	77
N.H.	604,000	120,000	724,000	128
N.J.	4,360,000	511,000	4,871,000	749
N.M.	702,000	395,000	1,097,000	212
N.Y.	6,978,000	1,010,000	7,988,000	1,650
N.C.	3,421,000	1,196,000	4,617,000	900
N.D.	370,000	268,000	638,000	124
Ohio	6,536,000	1,454,000	7,990,000	1,268
Okla.	1,844,000	885,000	2,729,000	418
Ore.	1,579,000	548,000	2,127,000	349
Pa.	5,897,000	1,234,000	7,131,000	1,375
R.I.	557,000	83,000	640,000	132
S.C.	1,541,000	479,000	2,020,000	414
S.D.	371,000	237,000	608,000	124
Tenn.	2,597,000	738,000	3,335,000	681
Tex.	7,606,000	3,181,000	10,787,000	2,049
Utah	682,000	318,000	1,000,000	192
Vt.	280,000	80,000	360,000	90
Va.	3,137,000	567,000	3,704,000	647
Wash.	2,344,000	962,000	3,306,000	547
W.Va.	978,000	406,000	1,384,000	247
Wis.	2,449,000	568,000	3,017,000	565
Wyo.	282,000	197,000	479,000	91
Total	124,336,000	35,424,000	159,760,000	28,956

Sources: [1]U.S. Federal Highway Administration (preliminary figures for 1980). [2]JOBBER TOPICS (Sept. 1981). [3]Vehicles Per Wholesaling Outlet obtained by dividing outlets into total registration. [4]R. L. Polk & Co., Marketing

at the Wholesaler's Market

Vehicles Per Wholesaling Outlet[3]	Car Dealers[4]	Truck Dealers[4]	Service Stations[5]	Auto Repair Shops[5]	State
5,413	445	277	1,712	2,473	Ala.
6,166	55	19	199	346	Alaska
6,165	221	99	884	1,764	Ariz.
3,782	375	169	1,531	2,085	Ark.
7,210	2,028	856	7,180	16,633	Calif.
5,075	328	140	1,484	2,293	Colo.
5,715	444	162	1,695	1,618	Conn.
4,902	71	45	312	335	Del.
7,750	34	10	163	176	D. of C.
6,192	947	470	4,071	6,660	Fla.
4,849	701	416	2,778	3,799	Ga.
6,847	71	30	377	620	Hawaii
4,783	191	101	644	850	Idaho
5,630	1,523	666	4,666	6,463	Ill.
4,782	823	472	2,730	3,891	Ind.
3,815	685	352	2,548	2,743	Iowa
4,282	491	235	1,766	2,258	Kan.
4,683	481	268	2,003	2,473	Ky.
5,636	408	264	1,780	2,517	La.
3,785	222	128	689	1,145	Maine
7,785	395	201	1,562	2,042	Md.
5,878	766	332	2,823	3,905	Mass.
6,088	1,050	493	3,645	4,624	Mich.
6,386	693	329	2,669	2,868	Minn.
4,258	393	193	1,015	1,672	Miss.
3,865	738	362	3,088	4,017	Mo.
4,547	217	116	743	859	Mont.
4,103	358	206	1,503	1,581	Neb.
8,922	82	37	351	511	Nev.
5,656	199	98	520	844	N.H.
6,503	899	338	4,035	4,502	N.J.
5,175	185	80	831	1,014	N.M.
4,841	1,748	600	7,013	9,055	N.Y.
5,130	831	389	2,948	4,817	N.C.
5,145	195	82	642	507	N.D.
6,301	1,384	641	3,983	6,374	Ohio
6,529	533	253	1,940	2,692	Okla.
6,095	390	212	1,261	2,174	Ore.
5,186	1,775	784	5,637	9,455	Pa.
4,848	111	51	510	651	R.I.
4,879	380	188	1,509	2,232	S.C.
4,903	213	95	798	678	S.D.
4,897	591	353	2,053	3,062	Tenn.
5,265	1,737	754	5,709	11,085	Tex.
5,208	186	93	798	1,019	Utah
4,000	121	49	363	512	Vt.
5,725	655	260	2,350	3,033	Va.
6,044	479	215	1,782	3,002	Wash.
5,603	301	164	1,157	1,026	W.Va.
5,340	778	381	2,773	2,880	Wis.
5,263	117	64	442	422	Wyo.
	29,044	13,921	105,665	154,194	TOTAL

Services Division (1982). Further reproduction prohibited. [5]SUPER SERVICE STATION (April 1982). Stations qualified for automotive repair and service work. [4]U.S. Census of Business (1977).

ASIA Wholesaler's Costs, Income And Profit as Percentage of Sales

	Median Wholesaler (1980)
SALES	100.00%
Cost of Goods Sold	64.63%
GROSS MARGIN OF PROFIT (Sales minus cost of goods sold)	35.37%
SELLING EXPENSE (Includes: Advertising & sales promotion; salesmen's salary, commission, travel, etc.; sales supervisory salaries & commissions; countermen's salaries & commissions.)	9.92%
DELIVERY EXPENSE (Includes: Delivery salaries (including bonuses); vehicle operating expenses; depreciation—vehicle equipment; transportation out & parcel post.)	2.64%
STORE AND OCCUPANCY EXPENSE (Includes: Stockroom wages; heat, lights & water; rent or depreciation.)	4.99%
GENERAL AND ADMINISTRATIVE EXPENSE (Includes: Executive salaries & bonuses; supervisory salaries & bonuses; clerical salaries, wages & bonuses; purchase & inventory control salaries & wages; travel & trade regulations; office supplies & posage; misc. G & A expense (dues, donations, etc.); EDP equipment or purchase service cost; telephone & telegraph; legal & professional fees; taxes, general; taxes, payroll; insurance, general; employee benefits.)	15.55%
TOTAL OPERATING EXPENSES	32.95%
NET OPERATING INCOME	2.70%
TOTAL OTHER INCOME	1.43%
TOTAL INCOME	4.10%
TOTAL OTHER EXPENSES	1.29%
NET PROFIT BEFORE MACHINE SHOP	2.83%
NET PROFIT FROM SHOP OPERATIONS	.57%
NET PROFIT BEFORE TAXES	3.17%
FEDERAL INCOME TAXES	.56%
NET PROFIT AFTER TAXES	2.42%

Source: 1981 Edition of *Automotive Wholesaling Financial Operation and Performance Analysis*, published by the Automotive Service Industry Association.

Quick Profile of the Median ASIA Wholesaler

Figures Apply to 1980

SALES PERFORMANCE	
Average Sales Volume	$1,051,950
Percent Increase Over Previous Year	1.53%
Cash Sales As Percent of Total Sales	30.00%
PROFITABILITY PERFORMANCE	
Gross Profit Margin as Percent of Net Sales	35.37%
Net Profit Before Taxes as Percent of Net Sales	3.17%
Net Profit After Taxes as Percent of Net Sales	2.42%
ASSET MANAGEMENT	
Average Inventory Turnover Rate	3.08 (times)
Number of Days Average Inventory Carried	119 Days
Days Credit Sales in Accounts Receivable	44 Days
FINANCIAL MANAGEMENT[1]	
Net Worth to Total Indebtedness	1.33 to 1
Current Ratio	2.13 to 1
Accounts Receivable to Accounts Payable	1.26 to 1
OPERATING EXPENSES	
Total Operating Expenses to Net Sales	32.95%
Total Payroll Expenses as Percent of Net Sales	19.38%
PERSONNEL MEASUREMENTS	
Sales Volume Per All Non-Shop Employees	$73,330
Average Payroll Per All Non-Shop Employees	$13,880
MACHINE SHOP PERFORMANCE	
Shop Sales Per Shop Employee	$15,840
Average Wage or Salary Per Shop Employee	$12,080
Gross Profit Margin as Percent of Shop Labor Sales	34.45%
Shop Net Profit to Shop Labor Sales	15.07%

Source: 1981 Edition of *Automotive Wholesaling Financial Operation and Performance Analysis*, published by the Automotive Service Industry Association.
[1]These ratios relate dollars to dollars. In the ratio accounts receivable to accounts payable, for instance, the median wholesaler had $1.26 of accounts receivable for every $1.00 of accounts payable.

Productivity Measures For Staff of ASIA Jobber

Average Number of Non-Shop Employees	15
Merchandise Sales Per Non-Shop Employee	$73,330
Merchandise Gross Margin Per Non-Shop Employee	$25,280
Operating Expense Per Non-Shop Employee	$23,800
Total Payrol Expense as Percent of Merchandise Sales	19.38%
Total Compensation as Percent of Merchandise Sales	22.39%

Source: 1981 Edition of *Automotive Wholesaling Financial Operation and Performance Analysis*, published by the Automotive Service Industry Association.

ASIA's Median Wholesaler: How His Profits Scored In 1980

	Median Wholesaler (1980)
Gross Profit Margin as Percent of Net Sales	35.37%
Net Profit (Before Taxes) as Percent of Net Sales	3.17%
Net Profit (After Taxes) as Percent of Net Sales	2.42%
Net Profit (Before Taxes) as Percent of Total Assets	6.93%
Net Profit (After Taxes) as Percent of Total Assets	4.79%
Net Profit (Before Taxes) as Percent of Net Worth	11.54%
Net Profit (After Taxes) as Percent of Net Worth	9.37%
Net Profit (Before Taxes) as Percent of Net Working Capital	13.23%
Net Profit (After Taxes) as Percent of Net Working Capital	10.88%
Shop Gross Profit as Percent of Shop Labor Sales	34.45%
Shop Net Profit as Percent of Shop Labor Sales	15.07%

Source: 1981 Edition of *Automotive Wholesaling Financial Operation and Performance Analysis*, published by the Automotive Service Industry Association.

Canadian Wholesalers Report Sales of $4.9 Billion in '81

Year	Vehicle Registrations	Percent of Change	Automotive Jobber Sales	Percent of Change
1963	6,074,655	4.9	457,000,000	3.4
1964	6,457,850	5.9	462,262,000	1.1
1965	6,698,778	3.6	494,154,000	7.3
1966	7,035,261	5.0	524,400,000	5.6
1967	7,495,203	6.5	567,980,000	8.3
1968	7,877,547	5.3	702,886,000	23.8
1969	8,254,160	4.7	816,114,000	16.1
1970	8,497,339	2.9	865,681,000	6.1
1971	9,022,136	6.2	968,650,000	12.1
1972	9,619,400	6.6	1,721,114,000	—
1973	10,295,000	7.0	2,060,367,000	19.7
1974	10,910,000	6.0	2,529,207,000	22.7
1975	11,444,643	4.9	2,808,506,000	11.0
1976	11,674,000	2.0	3,197,059,000	13.8
1977	12,421,000	6.4	3,328,360,000	4.1
1978	12,975,000	4.5	3,572,951,000	7.3
1979	13,225,000	1.9	4,192,613,000	17.3
1980	13,599,000	2.8	4,394,264,000	4.8
1981	N.A.		4,868,844,512	10.8

Source: Statistics Canada.

Leading Merchandise Items As Reported by ASIA Wholesalers

The following merchandise items proved to be "best sellers" for ASIA wholesalers during 1980. Each item contributed more than one-half percent to the average wholesaler's total sales volume.

1. Resonators, Mufflers & Pipes
2. Spark Plugs
3. Storage Batteries
4. Alternators, Starters, Armatures (Remfg)
5. Belts & Hoses
6. Points, Rotors, Caps, Cond., & Distrib.
7. Oil Filters & Cartridges
8. Shock Absorbers & Levelers
9. Motor Oil
10. Paint & Thinner
11. Hand Tools (Manual)
12. Brake Shoes & Discs (Remfg)
13. Brake Drums & Hubs (New)
14. Ball Joints & Repair Kits
15. Air Filters & Cartridges
16. Carburetors & Repair Kits (New)
17. Brake Cylinders: Master & Wheels (New)
18. Bearings (All but Engine)
19. Gaskets
20. Shop Equipment
21. Alternators, Starters, Armatures (New)
22. Wiring & Cables
23. Engine Bearings
24. Air Conditioners & Parts
25. Clutch Units (Remfg)
26. Brake Shoes & Discs (New)
27. Water Pumps & Kits (New)
28. Water Pumps & Kits (Remfg.)
29. Abrasives & Tapes
30. Solenoids & Switches
31. Anti-Freeze
32. Timing Gears, Chains & Sprockets
33. Piston Rings
34. Clutch Units (New)
35. Fuel Pumps & Repair Kits (New)
36. Universal Joints & Kits
37. Hand Tools (Power)
38. Sealed Beam Headlights
39. Fasteners (All Types)
40. Carburetors & Repair Kits (Remfg.)

Source: 1981 Edition of *Automotive Wholesaling Financial Operation and Performance Analysis*, published by the Automotive Service Industry Association.

Employee Pay as Percent of Sales —Based on Median ASIA Jobber

Figures Apply to 1980

	Percent Of Sales (1980)
Outside Salesmen's Salaries, Travel, etc.	2.67%
Countermen's Salaries & Commissions	5.52%
Deliverymen's Salaries (Including Bonuses)	1.24%
Stockroom Wages	.78%
Executives Salaries & Bonuses	3.60%
Clerical Salaries & Bonuses	1.90%
Purchase & Inventory Salaries & Wages	.48%
Employee Benefits	1.15%
Total Payroll Expense	19.38%
Total Compensation	22.39%

Source: 1981 Edition of *Automotive Wholesaling Financial Operation and Performance Analysis*, published by the Automotive Service Industry Association.

Balance Sheet of Median ASIA Wholesaler—1980

	Median Wholesaler (1980)
ASSETS	
Cash and Marketable Securities	8.87%
Accounts and Notes Receivable, Trade, Net	20.67%
Inventory, End of Year	50.52%
All Other Current Assets	2.56%
Total Current Assets	82.53%
Net Fixed & All Other Non-Current Assets	17.47%
Total Assets	100.00%
LIABILITIES AND NET WORTH	
Accounts & Notes Payable, Trade	19.38%
Other Notes Payable & Other Current Liabilities	10.19%
Total Current Liabilities	29.31%
Long-Term Liabilities	15.02%
Total Liabilities	44.34%
Total Net Worth or Equity	55.66%
Total Liabilities and Net Worth	100.00%

Source: 1981 Edition of *Automotive Financial Operation and Performance Analysis*, published by the Automotive Service Industry Association.

Leading Product Groupings As Reported by ASIA Wholesalers

The following product "families" or lines proved to be the "best sellers" for ASIA wholesalers during 1980. Lines are ranked according to the dollar volume of sales generated.

1. Electrical System Parts
2. Ignition System Parts
3. Engine Parts (Internal)
4. Brake System Parts
5. Cooling System Parts
6. Chassis, Steering & Suspension
7. Exhaust System Parts
8. Filters & Cartridges
9. Paint & Body Supplies
10. Chemicals
11. Fuel System Parts
12. Hand Tools
13. Motor Oil
14. Accessories & Specialty Items
15. Bearings (All Except Engine)
16. Lighting System Parts
17. Shop Equipment
18. Grease & Lubricants
19. Small Engines & Parts
20. Tires & Tubes

Source: 1981 Edition of *Automotive Wholesaling Financial Operation and Performance Analysis*, published by the Automotive Service Industry Association.

Key Business Ratios For ASIA's Median Wholesaler

	Median Wholesaler (1980)
Ratio of Net Worth to Total Indebtedness	1.33 to 1
Ratio of Total Assets to Net Worth	1.75 to 1
Ratio of Sales to Net Worth (Turnover of Net Worth)	4.21 to 1
Ratio of Current Assets to Current Debts	3.13 to 1
Ratio of Accounts Receivable to Accounts Payable	1.26 to 1

Source: 1981 Edition of *Automotive Wholesaling Financial Operation* and *Performance Analysis*, published by the Automotive Service Industry Association. [1]All these ratios relate dollars to dollars. In the ratio of sales to net worth, for instance, the median wholesalers had $4.21 of sales for every $1 of net worth.

Wholesalers Failures During First Seven Months of 1981—66

Year	Number	Liabilities	Year	Number	Liabilities
1939	60	$ 581,000	1961	89	$ 3,744,000
1940	50	472,000	1962	80	4,696,000
1941	58	900,000	1963	74	3,917,000
1942	32	263,000	1964	94	3,452,000
1943	6	51,000	1965	84	4,488,000
1944	1	12,000	1966	98	5,632,000
1945	2	68,000	1967	91	9,211,000
1946	1	47,000	1968	72	8,411,000
1947	17	456,000	1969	49	7,383,000
1948	26	892,000	1970	61	4,617,000
1949	44	1,150,000	1971	59	8,478,000
1950	55	1,083,000	1972	46	4,452,000
1951	23	330,000	1973	55	10,295,000
1952	22	529,000	1974	60	7,024,000
1953	28	1,010,000	1975	65	12,122,000
1954	39	1,015,000	1976	57	30,272,000
1955	53	1,523,000	1977	48	27,849,000
1956	41	2,699,000	1978	43	6,270,000
1957	45	1,470,000	1979	36	47,734,000
1958	42	1,275,000	1980	109	47,730,000
1959	50	1,744,000	1981	66	20,403,000[1]
1960	77	4,191,000			

Source: Business Economics Division, Dun & Bradstreet, Inc. [1]1981 figures are for January through July. Any comparisons to figures from previous years are invalid.

ASIA's Median Wholesaler: How Well He Managed His Assets

	Median Wholesaler (1980)
Change in Inventory During Year	(Up) 2.49%
Average Inventory Turnover Rate	3.08 (Times)
Number of Days Average Inventory Carried	119 (Days)
Cash Sales as a Percent of Total Sales	30%
Days of Credit Sales in Accounts Receivable	44 (Days)
Sales as a Percent of Net Working Capital	4.29%
Ratio of Sales to Assets (Total Asset Turnover)	2.29 to 1[1]

Source: 1981 Edition of *Automotive Wholesaling Financial Operation and Performance Analysis*, published by the Automotive Service Industry Association. [1]This ratio relates dollars to dollars. There were $2.29 of sales to every $1.00 of assets.

Sales of Automotive Wholesalers To Wholesalers, Users & Retailers

(Add 000)

	1980[2]	1977[2]	1972[2]	1967	1963
Sales to Other Wholesalers	$10,732,300	$ 7,813,141	$ 5,995,590	$ 2,408,867	$ 1,872,826
Sales to Users And Retailers	15,444,048	12,966,489	8,279,624	4,980,296	4,267,587
Total Sales[1]	26,176,348	20,779,630	14,275,214	7,389,163	6,140,413[3]

Source: Bureau of the Census, U.S. Department of Commerce. [1]Includes machine shop parts and labor. [2]Estimate by Market PROBE (of the Irving-Cloud Publishing Co.) [3]Adjusted U.S. Census of Business figures.

Jobber Sales by Type of Customer

Percentage of Business Done in Markets

	1982	1980	1979	1975	1971
Gasoline Service Stations	24.1%	26.9%	26.7%	30.1%	32.7%
Car and Truck Dealers	10.6%	12.2%	13.7%	13.5%	16.8%
General & Specialized Repair Shops	21.9%	22.1%	22.7%	20.7%	19.2%
Fleet and Heavy Duty Acc'ts.	10.9%	12.3%	11.3%	13.0%	16.3%
Farm Equipment Acc'ts.	2.7%	4.1%	4.3%	3.8%	2.7%
Miscellaneous Acc'ts.	5.1%	2.2%	2.8%	2.6%	3.1%
Retail Trade[1]	21.6%	20.2%	18.5%	16.3%	9.2%
Tire Dealers	3.1%	NA	NA	NA	NA

Sources: Market PROBE studies of The Irving-Cloud Publishing Co. and JOBBER TOPICS' "Executive Forum Studies." [1]Sales of items to customers for their personal use only. Not included are sales of items to traditional trade customers who may buy on a pick-up basis. Note: These percentages represent jobber sales only. Sales by warehouse distributors are not reported.

Number of Automotive Wholesaler Establishments by Sales Size

Number of Establishments

Annual Sales Volume	1980[1]	1977	1972	1967	1963
$10,000,000 or more	600	559	249	88	16
$ 5,000,000-$9,999,999					
$ 2,000,000-$4,999,999	1,500	1,250	702	329	192
$ 1,000,000-$1,999,999	9,150	6,601	4,542	2,650	633
$ 500,000-$ 999,999					1,646
OVER $500,000	11,250	8,410	5,493	3,067	2,525

Number of Establishments

Annual Sales Volume					
$ 300,000-$499,999	10,400	9,653	8,168	5,807	2,307
$ 200,000-$299,999					2,869
$ 100,000-$199,999	3,750	4,973	6,110	6,075	5,949
Under $50,000	1,600	2,429	4,536	6,381	6,517
UNDER $100,000	15,750	17,055	18,814	18,263	17,642
Not Operated Entire Year	1,750	1,673	1,272	525	885
TOTAL ESTABLISHMENTS	28,750	27,138	25,579	21,855	21,032[2]

Source: Bureau of the Census, U.S. Department of Commerce. [1]Estimate by Market PROBE (of The Irving-Cloud Publishing Co.) [2]Totals based on U.S. Business Census figures published as of given years.

ASIA Wholesaler's Shop Profit As Percent of Labor Sales—1980

	Median Wholesaler (1980)
SALES-SHOP LABOR	100.00%
Cost of Shop Labor Sales (Salaries, Wages and Bonuses)	66.17%
GROSS PROFIT ON SHOP LABOR SALES	34.45%
All Other Shop Expenses (Overhead, Depreciation, Repairs & Maintenace, Supplies, etc.)	17.18%
NET PROFIT FROM SHOP OPERATIONS	15.07%

Source: 1981 Edition of *Automotive Wholesaling Financial Operation and Performance Analysis*, published by the Automotive Service Industry Association.

ASIA Jobber's Operating Costs As Percent of Gross Margin

	Median Wholesaler (1980)
Total Payroll as Percent of Gross Margin	55.24%
Total Compensation as Percent of Gross Margin	62.69%
Total Selling Expenses as Percent of Gross Margin	28.23%
Total Delivery Expenses as Percent of Gross Margin	7.58%
Total Store & Occupancy Expenses as Percent of Gross Margin	14.00%
Total General & Administrative Expense as Percent of Gross Margin	41.35%
Total Non-People Expenses as Percent of Gross Margin	31.35%
Total Operating Expenses as Percent of Gross Margin	91.94%

Source: 1981 Edition of *Automotive Wholesaling Financial Operation and Performance Analysis*, published by the Automotive Service Industry Association.

Profiles: Publicly Owned Groups

Figures Apply to 1981 With Certain Exceptions, As Noted

Company	Sales	Assets	Net Income	Employees
Amalgamated Automotive Industries, Inc., Harrisburg, PA	$ 9,520,000[1]	5,919,000	[d]127,000	120
Beck/Arnley Corp., Melville, NY	26,272,000[2]	19,227,000	[d]884,000	N.A.
General Automotive Parts Corp., Irving, TX	240,138,000[2]	102,982,000	14,588,000[3]	1,200
Genuine Parts Co., Atlanta, GA	1,431,713,000[2]	526,701,000	67,833,000	11,558
MAPI, Inc., Dayton, OH	31,316,000[4]	15,632,000	[d]427,000	600
Mid-America Industries Inc., Ft. Smith, Ark.	73,137,000[2]	42,534,000	1,033,000	870
RPS Products, Inc., Baltimore, MD	37,492,000[3]	19,359,000	[d]544,000	892
Republic Automotive Parts, Inc., East Detroit, MI	78,872,000[2]	40,153,000	2,366,000	715
UAP, Inc., Montreal, Quebec, Canada	153,233,000[2]	66,330,000	2,581,000	1,400
United Consolidated Industries, Inc., Hanover, MD	23,211,000[6]	11,584,000	[d]414,000	254

Source: *Moody's Industrial Manual* for 1981 and *Moody's OTC Industrial Manual* for 1981. [1]For fiscal year ended Oct. 31, 1980. [2]For fiscal year ended Dec. 31, 1981. [3]After $2,384,000 (1979 $2,108,000; 1978 $1,877,000) depr. and amort. [4]For fiscal year ended April 30, 1979. [5]For fiscal year ended June 30, 1980. [6]For fiscal year ended Jan. 31, 1981. [d]Signifies net loss.

Measures of ASIA Wholesaler's Financial Performance In 1980

	Median Wholesaler (1980)
SALES MEASURES	
Dollars of Net Sales	$1,051,950
Percent Sales Change From Prior Year	(Up) 1.53%
Sales Growth From 1970 to 1980	(Up) 141.88%
NET PROFIT MARGIN	
Net Profit Before Taxes as a Percent of Net Sales	3.17%
Net Profit After Taxes as a Percent of Net Sales	2.42%
RETURN ON INVESTMENT	
Net Profit Before Taxes as a Percent of Total Assets	6.93%
Net Profit After Taxes as a Percent of Total Assets	4.79%
RETURN ON OWNERS INVESTMENT	
Net Profit Before Taxes as a Percent of Net Worth	11.54%
Net Profit After Taxes as a Percent of Net Worth	9.37%
Net Profit Before Taxes as a Percent of Net Working Capital	13.23%
Net Profit After Taxes as a Percent of Net Working Capital	10.88%
GROSS MARGIN PERFORMANCE	
Gross Profit Margin on Merchandise Sales	35.37%
Shop Gross Profit as a Percent of Shop Labor Sales	34.45%
Shop Net Profit as a Percent of Shop Labor Sales	15.07%
OVERALL OPERATING EXPENSE CONTROL	
Total Operating Expense as a Percent of Net Sales	32.95%
Total Operating Expense as a Percent of Gross Margin	91.94%
Non-People Expenses as a Percent of Gross Margin	37.13%
Total Compensation as a Percent of Total Operating Expenses	66.99%
Total Compensation as a Percent of Merchandise Gross Margin	62.69%

Source: 1981 Edition of *Automotive Wholesaling Financial Operation and Performance Analysis*, published by the Automotive Service Industry Association.

Number of Automotive Wholesalers by Type of Business

	1980[2]	1977	1972	1967	1963
TOTAL ESTABLISHMENTS[1]	28,750	27,138	25,579	21,855	21,498
Without machine shops	19,250	17,917	15,518	13,096	
With machine shops	7,500	7,263	8,119	6,596	21,052
Used parts/equipment wholesalers	1,600	1,573	1,465	1,708	
Petroleum products, marketing equipment wholesalers	400	385	477	455	446

Source: Bureau of the Census, U.S. Department of Commerce. [1]The term "total establishments" refers to automotive *merchant* wholesalers. [2]Estimate by Market PROBE (of The Irving-Cloud Publishing Co.)

1977 Census Shows U.S. Has 28,779 Automotive Wholesalers

	Automotive Wholesalers By State		Sales of Wholesalers By State (Add 000)	
	1977	1972	1977	1972
AL	563	553	N.A.	202,712
AK	60	45	41,999	21,368
AZ	329	297	N.A.	138,415
AR	389	340	193,062	N.A.
CA	2,568	2,185	3,430,784	1,322,919
CO	400	351	450,743	203,814
CT	376	323	283,506	182,680
DE	67	63	94,082	N.A.
D. of C.	37	48	40,624	N.A.
FL	1,322	1,092	897,593	442,161
GA	832	723	1,006,240	392,428
HI	70	61	56,928	35,528
ID	166	136	91,759	N.A.
IL	1,281	1,125	2,328,397	723,090
IN	743	678	931,374	N.A.
IA	510	445	297,055	182,268
KS	404	378	593,498	N.A.
KY	492	460	N.A.	196,939
LA	516	491	368,110	N.A.
ME	154	141	74,249	N.A.
MD	407	350	422,614	N.A.
MA	746	630	750,774	331,520
MI	1,197	909	3,570,220	897,365
MN	596	492	725,439	301,903
MS	350	350	238,773	114,467
MO	751	685	760,940	318,747
MT	134	141	N.A.	N.A.
NE	308	279	225,682	134,504
NV	76	63	56,463	N.A.
NH	116	116	83,268	N.A.
NJ	837	698	1,207,057	549,817
NM	164	158	88,645	55,066
NY	1,881	1,632	1,804,499	898,359
NC	841	745	651,133	360,430
ND	132	131	93,923	N.A.
OH	1,353	1,298	1,921,823	771,851
OK	413	447	284,688	179,386
OR	374	318	382,456	168,794
PA	1,398	1,355	1,132,461	671,219
RI	118	120	79,219	N.A.
SC	345	310	157,250	N.A.
SD	116	103	60,649	N.A.
TN	696	626	892,509	370,325
TX	1,840	1,674	2,044,024	856,093
UT	208	177	159,021	N.A.
VT	83	65	31,589	N.A.
VA	641	552	482,663	306,186
WA	504	461	531,306	N.A.
WV	277	264	136,152	N.A.
WI	525	458	407,597	N.A.
WY	73	71	40,080	N.A.
TOTALS	28,779	25,579	31,615,601	13,556,013

Source: U.S. Census of Business (1977). "N.A." means figures are not available for publication.

Automotive Wholesalers Among Largest In 1981

Based on Number of Branch Stores and Outside Salesmen

	Branches	Salesmen	Shops
Arnold Motor Supply, Spencer, IA	19	46	19
Automotive Supply Co., Altoona, PA	28	35	9
Automotive Supply Co., Appleton, WI	11	15	12
Barnes Motor & Parts Co., Inc., Wilson, NC	20	34	6
Big A Auto Parts, Houston, TX	106	89	30
Blankenship & Co., Inc., E., Marion, IL	16	16	5
Burdman Auto Parts, Inc., J., Kirksville, MO	29	28	1
Chanen's Auto Supply Co., Quincy, IL	14	12	1
Craig Motor Service Co., Inc., Clarksburg, WV	12	10	10
Crow-Burlingame Co., Little Rock, AR	53	59	3
Dayton Warehouse Co., Fargo, ND	10	21	8
Everson Co., H. E., Grand Falls, ND	20	15	1
Fochtman Motor Co., Petoskey, MI	12	13	3
Genuine Parts Co., Minneapolis, MN	13	12	4
Heavy Duty Parts, Inc., Harrisburg, PA	26	51	1
Hedahls, Inc., Bismarck, ND	13	20	9
Hill Piston Service Co., Inc., Hillsdale, MI	13	11	4
Interstate Auto Supply Co., Inc., Elizabethtown, KY	14	17	5
Jarvis Auto Supply, Winfield, KS	11	12	1
Jasper Engine and Transmission Exch., Jasper, IN	12	17	1
Keenan Auto Parts Co., Albany, GA	30	19	17
Keystone Bros., San Francisco, CA	10	40	—
Linkon's Auto Supply Co., Centralia, IL	17	23	2
Motor Bearing and Parts Co., Raleigh, NC	17	25	5
Motor Rim and Wheel Service, Montebello, CA	11	42	1
Motor Supply Co., Inc., Meridian, MI	12	12	2
National Auto Supply Co., St. Louis, MO	27	32	16
Northern Auto Supply Co., Marshfield, WI	26	20	11
O.K. Auto Parts, Inc., Ironwood, MI	10	10	1
R.P.S. Products of Arizona, Inc., Phoenix, AZ	15	12	4
Rodefeld Co., Inc., Richmond, IN	15	15	11
Rupp Automotive, Chillicothe, MO	18	10	6
Sanel Auto Parts, Concord, NH	34	36	4
Sieg Cedar Rapids Co., Cedar Rapids, IA	11	10	2
Sieg Co., Davenport, IA	15	12	1
Stickney's, Inc., Sterling, CO	12	12	1
Sturdevant's Inc., Wahpeton, ND	12	10	5
Valley Motor Supply Co., Havre, MT	33	32	6
Wharton & Bernard, Inc., Milford, DE	10	10	2
Wheel Industries, Los Angeles, CA	11	18	—
Womwell Automotive Parts Co., Lexington, KY	15	15	3
Woolwine Supply Co., The, Pratt, KS	12	14	3

Source: JOBBER TOPICS, Directory of Automotive Jobbers, 1981-82.

ASIA Manufacturers' Sales

By Type of Company

PCT. OF AUTOM. SALES	Mtr. Pts. (Pct.)	Chas. Pts. (Pct.)	Equip. & Tools (Pct.)	Chemicals (Pct.)	Refinishing Mat'ls (Pct.)	Supp. & Access. (TBA) (Pct.)	Serv. Items (Pct.)	Remanufacturers (Pct.)
—Direct to Whslrs.								
Av. of Tot. Sls.	5.40	4.35	20.70	16.71	38.50	6.57	0.00	12.26
Mfrs. selling 100 Pct.	0.00	0.00	4.35	11.11	0.00	0.00	0.00	0.00
Mfrs. selling nothing	64.71	76.92	39.13	44.44	0.00	60.00	100.00	42.86
—Thru Redist. Whslrs.								
Avg. of Tot. Sls.	5.86	4.42	2.42	8.09	2.50	8.08	4.60	4.80
Mfrs. selling 100 Pct.	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Mfrs. selling nothing	47.06	53.85	73.91	66.67	50.00	50.00	50.00	64.29
—Thru WDs								
Avg. of Tot. Sls.	56.72	54.07	44.70	38.23	27.00	22.17	49.60	63.36
Mfrs. selling 100 Pct.	5.88	15.38	0.00	0.00	0.00	0.00	0.00	7.14
Mfrs. selling nothing	0.00	15.38	26.09	22.22	0.00	10.00	0.00	7.14
—Thru HD Distributors								
Avg. of Tot. Sls.	2.38	18.07	1.84	.78	.25	8.50	17.50	4.11
Mfrs. selling 100 Pct.	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Mfrs. selling nothing	29.41	53.85	73.91	77.78	66.67	80.00	50.00	71.43

Average Miles Per Vehicle by Year

		BUSES			TRUCKS			
	Passenger Cars	Motorcycles	Commercial Buses	School Buses	All Buses	Single Unit Trucks	Truck Combinations	All Trucks	All Motor Vehicles
1980	9,135	3,144	32,765	7,592	12,103	10,070	42,705	11,433	9,410
1979	9,485	4,000	29,691	7,179	11,732	9,184	49,864	10,810	9,380
1978	10,046	4,500	30,377	7,500	12,143	9,249	49,267	10,974	10,039
1977	9,839	4,500	30,011	7,491	11,973	9,400	50,206	11,145	9,926
1976	9,763	4,500	29,936	7,502	12,044	9,369	48,297	11,086	9,844
1975	9,634	4,500	28,230	6,788	11,140	8,882	49,125	10,648	9,644
1974	9,448	4,500	28,968	6,865	11,320	8,981	51,667[2]	10,861	9,530
1970	9,978	3,605	32,591	7,274	13,306	9,807	41,903	11,450	10,076
1965	9,387	3,770	35,518	7,689	15,215	10,003	39,795	11,587	9,677
1960	9,446	[1]	37,789	7,556	16,004	—	—	10,583	9,652

Source: U.S. Federal Highway Administration, Highway Statistics, Annual.
[1]Motorcycles are included in passenger cars. [2]Not comparable to previous years.

And Distribution Practices

PCT. OF AUTOM. SALES	Mtr. Pts. (Pct.)	Chas. Pts. (Pct.)	Equip. & Tools (Pct.)	Chemicals (Pct.)	Refinishing Mat'ls (Pct.)	Supp. & Access. (TBA) (Pct.)	Serv. Items[1] (Pct.)	Remanufacturers (Pct.)
—Thru Other Replacement Outlets								
Avg. of Tot. Sls.	4.84	4.46	10.77	11.77	23.75	22.26	4.35	2.76
Mfrs. selling 100 Pct.	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Mfrs. selling nothing	58.82	53.85	34.78	55.55	0.00	20.00	50.00	64.29
—Thru Other Independent Mfrs.								
Avg. of Tot. Sls.	6.01	4.04	2.36	0.00	.25	14.35	2.58	.34
Mfrs. selling 100 Pct.	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Mfrs. selling nothing	58.82	61.54	86.96	100.00	50.00	40.00	50.00	85.71
—Thru Remanufacturers								
Avg. of Tot. Sls.	1.99	.54	3.48	7.33	0.00	1.75	0.00	6.86
Mfrs. selling 100 Pct.	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Mfrs. selling nothing	76.47	92.31	91.30	66.67	100.00	60.00	100.00	78.57
—To OEM								
Avg. of Tot. Sls.	10.84	5.76	3.42	10.87	2.75	10.02	13.25	5.43
Mfrs. selling 100 Pct.	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Mfrs. selling nothing	58.82	53.85	52.17	44.44	0.00	30.00	25.00	71.43

Source: Eighth Edition (1981) of ASIA's *Analysis of Manufacturers and Remanufacturers Sales Costs, Performance and Distribution.* [1]"Service Items" is a category including such other products as truck mirrors, warning lights, etc.

Number of Automobile Dealers By Year, 1968 to 1982

Date	No. of Retail Outlets	Pct. Gain or Loss from Previous Year
January 1, 1968	27,784	—2.24
January 1, 1969	27,486	—1.07
January 1, 1970	27,071	—1.51
January 1, 1971	26,126	—3.49
January 1, 1972	25,621	—1.93
January 1, 1973	25,441	—0.70
January 1, 1974	25,349	—0.36
January 1, 1975	24,980	—1.46
January 1, 1976	24,453	—2.11
January 1, 1977	24,268	—0.76
January 1, 1978	24,147	—0.50
January 1, 1979	24,051	—0.40
January 1, 1980	23,379	—2.79
January 1, 1981	21,772	—6.87
January 1, 1982	21,680[1]	—0.41

Source: Reprinted with permission from *Automotive News.* Copyright 1982. [1]1982 includes Volkswagon.

PBE Wholesalers' Cost of Doing Business, as Reported by ASIA

Median Figures—Based on 1981 Operations and Expressed as Percentage of Total Sales

NET SALES (After Returns & Allowances)	100.0%
Cost of Sales—Merchandise	66.3%
Gross Margin of Profit—Merchandise	33.7%
Total Operating Expenses (Selling, Delivery, Store, General & Administrative)	29.3%
Net Operating Income	3.4%
Total Other Income	.8%
Total Other Expenses	1.1%
Net Profit Before Taxes	3.0%
Federal Income Tax	.8%
Net Profit After Taxes	2.9%
OPERATING EXPENSES	
Labor & Commissions (All payroll for executives, salesmen, and other employees)	17.5%
Advertising and Sales Promotion	.4%
Vehicle Expense—Total (Includes delivery expenses, salesmen's cars, other company operated vehicles)	2.0%
Janitorial Service	N.A.
Donations	.1%
Professional Fees (Includes Legal, Accounting, etc.)	.3%
Dues and Subscriptions	.1%
Depreciation (Vehicle equipment, store fixtures, etc.)	1.1%
Travel and Entertainment (All company related)	.3%
Utilities (Heat, Lights, Water)	.4%
Telephone	.6%
Insurance (Includes group, life, vehicle, etc.)	1.4%
Office and Store Expense (Supplies, light bulbs, etc.)	.8%
Rent	1.3%
Repair and Maintenance	.4%
Data Processing Equipment (Leasing, purchase, service)	.8%[1]
Taxes (General)	.5%
Taxes (Payroll—for all employees)	1.3%
Employee Benefits (Includes profit sharing, pension fund, IRA, etc.)	1.0%
TOTAL OPERATING EXPENSES	29.3%

Source: 1982 Edition of Cost of Doing Business Study for ASIA PBE Wholesaler Division. [1]This question was answered by only 25% of the respondents. Median sales for all reporting PBE Wholesalers—$985,935.

United States Shipments

Year	Original Equipment	Replacement	Export	Total
1963	41,893,212	79,034,998	962,022	121,890,232
1964	42,512,229	88,162,986	1,463,523	132,138,738
1965	51,412,623	94,892,519	2,191,850	148,496,992
1966	47,362,437	101,811,550	1,782,865	150,956,852
1967	40,826,776	108,499,236	1,653,143	150,979,155
1968	49,873,009	121,087,862	2,667,349	173,628,220
1969	46,171,964	129,112,243	1,850,139	177,134,346
1970	37,534,361	129,608,239	1,496,969	168,639,569
1971	48,609,436	135,008,955	1 558,278	185,176,669
1972	51,291,596	141,295,278	1 9,259	194,533,133

Source: *Rubber Manufacturers Association.* [1]Figures have been adjusted to include those manufacturers, both foreign and domestic, that do not report

How ASIA Heavy Duty Distributor Measured Up In Sales, Profits, Etc.

Figures Apply to 1980

	Median Distributor (1980)
SALES PERFORMANCE MEASURES	
Average Sales Volume (Merchandise Sales)	$1,920,220
Percent of Sales Change Over Prior Year	(Up) 5.96%
Cash Sales as Percent of Total Merchandise Sales	7.00%
PROFITABILITY PERFORMANCE MEASURES	
Gross Profit as a Percent of Net Merchandise Sales	30.03%
Net Profit (Before Taxes) as a Percent of Net Merchandise Sales	2.81%
Net Profit (After Taxes) as a Percent of Net Merchandise Sales	1.87%
ASSET MANAGEMENT MEASURES	
Average Inventory Turnover Rate	3.26 (Times)
Number of Days Average Inventory Carried	112 (Days)
Overall Average Collection Period	42 (Days)
FINANCIAL MANAGEMENT MEASURES	
Total Debt as a Percent of Net Worth	84.71%
Ratio of Total Assets to Net Worth	1.85 to 1[1]
Current Ratio (Assets to Liabilities)	2.48 to 1[1]
OPERATING EXPENSES	
Total Operating Expense as a Percent of Net Merchandise Sales	29.17%
Total Operating Expense as a Percent of Gross Profit From Merchandise Sales	91.51%
PERSONNEL MEASURES	
Sales Volume Per Non-Shop Employee	$103,540
Average Payroll Per Non-Shop Employee	$ 17,130
MACHINE SHOP PERFORMANCE	
Shop Sales Per Shop Employee	$25,000
Average Wage or Salary Per Shop Employee	$14,620
Gross Profit Per Machine Shop Employee	$ 8,730
Shop Net Profit As a Percent of Shop Labor Sales	14.94%

Source: 1981 Edition of *Management Performance Measurement* for ASIA Heavy Duty Distributors, published by the Automotive Service Industry Association. [1]Ratios relate dollars to dollars. In the ratio of total assets to net worth, for instance, there was $1.85 of total assets to every $1 of net worth.

Of Passenger Car Tires

Year	Original Equipment	Replacement	Export	Total
1973	55,959,546	142,002,271	3,627,931	201,589,748
1974	43,307,222	123,459,857	7,615,760	174,382,839
1975	39,280,833	122,468,550	5,290,424	167,039,807
1976	49,905,133	122,999,524	4,104,659	177,009,316
1977	55,667,960	129,283,293	4,600,816	189,552,114
1978	54,962,674	135,151,410	3,752,806	193,866,890
1979	48,188,000	121,922,000	3,909,000	174,019,000
1980	34,932,806	106,912,217	4,074,250	145,919,273
1981[1]	35,979,000	125,263,000	4,017,000	165,259,000

to RMA. Since the 1981 figures, for the first time, represent 100% of the U.S. Tire Market, any comparisons with previous figures are invalid.

Productivity of People Working For ASIA Heavy Duty Distributors

	Median Distributor (1980)
Non-Shop Personnel	
Parts & Merchandise Sales Per Non-Shop Employee	$103,540
Parts & Merchandise Gross Profit Per Non-Shop Employee	$ 32,160
Personnel Productivity Index: Gross Profit to Payroll	1.99 to 1[1]
Parts & Merchandise Sales Per Outside Salesman	$610,900
Parts & Merchandise Gross Profit Per Outside Salesman	$193,840
Non-Shop Payroll as Percent of Parts & Merchandise Sales	15.94%
Non-Shop Payroll as Percent of Parts & Merchandise Gross Profit	50.30%
Non-Shop Payroll as Percent of Non-Shop Operating Expenses	53.40%
Average Payroll Per Non-Shop Employee	$ 17,130
Salary & Bonus of Highest Paid Executive	$ 54,160
Salary & Bonus of Second Highest Paid Executive	$ 35,000
Salary & Bonus of Highest Paid Executive as Percent of Parts & Merchandise Sales	2.62%
Salary & Bonus of Second Highest Paid Executive as Percent of Parts & Merchandise Sales	1.31%
Machine Shop Personnel	
Machine Shop Sales Per Machine Shop Employee	$ 25,000
Machine Shop Gross Profit Per Machine Shop Employee	$ 8,730
Average Wage Per Machine Shop Employee	$ 14,620
Personnel Productivity Index (All Shop Personnel): Gross Profit to Payroll	62 to 1[1]

Source: 1981 Edition *Management Performance Measurement* for ASIA Heavy Duty Distributors, published by the Automotive Service Industry Association.
[1]Ratios relate dollars to dollars. In the Personnel Productivity Index, for example, there was $1.99 of gross profit for every $1.00 of payroll.

Number of Workers by Category Of Median ASIA Wholesaler

	Average Number Employed
Outside Salesmen	2.00
Countermen	4.00
Deliverymen	2.00
Stockroom Employees	2.00
Executives	1.00
General & Administrative Clerical Employees	2.00
Purchasing & Inventory Employees	1.75
Non-Shop Employees	15.00
Shop Employees	2.50

Source: 1981 Edition of *Automotive Wholesaling Financial Operation and Performance Analysis*, published by the Automotive Service Industry Association.

Relative Size of State and Regional Wholesaler Associations

1981 Rank	Association	Regular Members	Assoc. Members	1981 Rank	Association	Regular Members	Assoc. Members
1	Texas	1,501	—	21	Chesapeake	225	30
2	California	1,000	75	22	Iowa	223	110
3	Illinois	976	375	23	Louisiana	213	38
4	Ohio	705	169	24	Wisconsin	196	87
5	N. England	600	20	25	Virginia	189	30
6	Florida	553	58	26	Arizona	179	28
7	Michigan	550	52	27	S. Carolina	172	14
8	New Jersey	511	137	28	N. Mexico	165	65
9	Washington	411	62	29	Minnesota	150	15
10	N. Carolina	400	34	30	Rocky Mtn.	102	30
11	Kentucky	396	39	31	Misissippi	100	16
12	Mo./Kans.	378	96	32	Arkansas	94	—
13	Penn.	359	29	33	W. Virginia	80	—
14	Tenn.	325	—	34	Idaho	60	40
15	Indiana	310	26	35	Nebraska	57	17
16	Oklahoma	306	—	36	N. Dakota	45	7
17	Alabama	300	15	37	Montana	31	—
18	Georgia	290	40	38	Nevada	23	—
19	New York	260	51	TOTALS		12,695	1,840
20	Oregon	260	25				

Source: September 1981 issue of JOBBER TOPICS.

How States Rank According To Output of Automobiles

	Total Output 1981	Pct. of Output 1981	Overall Pos. 1981	Total Output 1980	Pct. of Output 1980	Overall Pos. 1980	Pct. Pt. Change '81 vs. '80
Michigan	1,867,175	32.44	1	1,731,830	26.99	1	+ 5.45
Delaware	439,094	7.63	2	430,067	6.70	4	+ 0.93
Georgia	393,233	6.83	3	439,939	6.86	3	— 0.03
Illinois	382,895	6.65	4	363,146	5.66	7	+ 0.99
New Jersey	379,314	6.59	5	399,488	6.23	5	+ 0.36
Missouri	275,804	4.79	6	370,783	5.78	6	— 0.99
California	260,238	4.52	7	261,242	4.07	12	+ 0.45
Kansas	256,503	4.46	8	312,849	4.88	9	— 0.42
Wisconsin	253,104	4.40	9	285,929	4.46	11	— 0.06
Texas	233,480	4.06	10	187,314	2.92	14	+ 1.14
Ohio	216,086	3.75	11	501,278	7.81	2	— 4.06
Oklahoma	209,291	3.64	12	329,201	5.13	8	— 1.49
New York	198,471	3.45	13	287,491	4.48	10	— 1.03
Pennsylvania	167,755	2.91	14	197,106	3.07	13	— 0.16
Massachusetts	93,386	1.62	15	157,561	2.45	15	— 0.83
Maryland	89,016	1.55	16	104,192	1.62	16	— 0.07
Kentucky	40,886	0.71	17	57,469	0.89	17	— 0.18
*TOTALS	5,755,813	100.00		6,416,885	100.00		

*Total does not include Pontiac figures. Pontiac refused to provide figures based on geographical locations.

Source: Reprinted with permission from *Automotive News*. Copyright 1982

Statistical History of the IASI Show[1]

Year	Place	Exhibitors	Booths	Net Square Ft. (Booth Space)	Total
1933	Chicago	268	562	62,324	10,781
1934	Cleveland	336	798	72,261	13,348
1935	Atlantic City	350	850	92,400	12,761
1936	Chicago	357	915	98,632	13,476
1973	Chicago	380	1,012	110,095	13,045
1938	Chicago	355	947	103,412	15,526
1939	Chicago	351	961	108,413	13,366
1940	Chicago	352	969	117,331	12,925
1946	Atlantic City	430	1,169	126,888	13,712
1947	Chicago	486	1,327	171,978	19,888
1948	Chicago	520	1,444	178,510	19,534
1950	Chicago	522	1,385	172,463	17,067
1952	Atlantic City	460	1,275	143,148	14,049
1953[2]	Chicago	289	440	44,000	4,288
1954[2]	Chicago	478	984	111,978	12,880
1959	Chicago	459	1,004	118,404	21,614
1960	New York	487	1,143	119,066	34,087
1961	Los Angeles	511	1,157		44,309[4]
1962	Chicago	504	1,275	146,926	29,090
1963	Philadelphia	518	1,347	138,844	22,975
1964	San Francisco	579	1,415		53,165[4]
1965	Chicago	542	1,422	148,980	18,177
1966	New York	505	1,139	116,887	17,640
1967	Chicago	548	1,419	146,050	17,379
1968	Las Vegas	560	1,488		19,512
1969	Chicago	516	1,403	145,220	18,449
1970	Las Vegas	576	1,514	136,780	21,157
1971	Chicago	496	1,407	140,700	18,989
1972	Chicago	526	1,444	158,000	20,226
1973	Las Vegas	559	1,579	157,900	25,190
1974	Chicago	510	1,523	157,450	17,219
1975	Chicago	542	1,523	157,550	20,824
1976	San Francisco	560	1,525	152,500	21,795
1977	Chicago	579	1,643	165,200	20,958
1978	Chicago	646	[5]	193,650	23,877
1979	Las Legas	746	2,016	201,600	28,237
1980	Chicago	684	[5]	201,880	23,156
1981	Chicago	659	[5]	191,000	23,765
1982	Las Vegas	756	2,035	203,500	27,480

Sources: Hall-Erickson, Inc. (producer of IASI Show); Pacific Automotive Show, Inc. (producer of PAS-IASI Show); and JOBBER TOPICS. [1]Before 1960, the event was known as the Automotive Service Industries Show. The "I", added in 1960, is for "International." Since 1968, whenever shows have been held in the western part of the nation, the IASIS has been preceded by PAS for Pacific Automotive Show. [2]Indicates booth conference only. [3]Indicates trade show plus booth conference. [4]Attendance figures for 1961 and 1964 are "turnstyle" counts the number of people passing through the gate as contrasted to an actual badge count. For all other years, the attendance figure is a badge count. [5]IASI officials discontinued reporting the number of show booths at the Chicago Shows in 1978.

The Meaning of Median Figures

Readers will notice that a number of tables in this special section make use of median figures instead of, say, average figures. Many modern business analysts believe that medians are more precise than averages—hence a growing trend toward the use of medians.

The word "median," according to the dictionary, refers to the middle. In a statistical sampling, the word median refers to that firm whose figures place it in the exact middle of the sampling. In a study of the business costs of a thousand automotive wholesalers, for example, the median wholesaler would be that firm in the middle; five hundred of the firms would have higher costs and five hundred would have lower costs—in graduated figures working away from that median or middle firm.

Performance Measures For ASIA Warehouse Distributors

	Median Distributor (1981)
SALES PERFORMANCE	
Dollars of Net Sales	$3,906,770
Percent of Sales Change Over Prior Year	8.55%
Number of Manufacturers Represented	68.50
Number of Product Lines Represented	110.00
PROFITABILITY PERFORMANCE	
Gross Margin to Net Sales	24.53%
Net Operating Profit to Net Sales	3.86%
Net Profit Before Taxes to Total Assets	5.71%
Net Profit Before Taxes to Net Worth	12.79%
Net Profit Before Taxes to Net Working Capital	13.52%
ASSET MANAGEMENT	
Average Inventory Turnover Rate	3.73 times
Days Sales in Accounts Receivable	42.58 days
Sales to Net Working Capital	6.70 to 1
Total Asset Turnover	2.45 to 1
FINANCIAL MANAGEMENT	
Net Worth to Total Indebtedness	66.67%
Total Assets to Net Worth	2.37 to 1
Turnover of Net Worth	6.14 times
Current Assets to Current Liabilities	1.84 to 1
Cash Plus Marketable Securities Plus Trade Receivables to Current Debt	.71 to 1
Accounts Receivable to Accounts Payable	.97 to 1
OPERATING EXPENSE CONTROL	
Total Operating Expense to Net Sales	20.55%
Total Operating Expense to Gross Margin	85.06%
Selling Expense to Net Sales	4.67%
Delivery Expense to Net Sales	2.10%
Warehouse & Occupancy Expense to Net Sales	4.97%
General & Administrative Expense to Net Sales	9.00%
PERSONNEL PRODUCTIVITY	
Net Sales Volume Per Employee	$ 150,260
Gross Margin Per Employee	$ 35,370
Net Sales Volume Per Outside Salesman	$1,374,990
Total Payroll Expense as a Percent of Net Sales	10.55%
Total Payroll Expense as a Percent of Gross Margin	42.76%

Source: 1982 Edition of the *Cost of Doing Business Analysis for ASIA Automotive Warehouse Distributors*. Some figures in the above table relate dollars to dollars. The figure for "Sales to Net Working Capital," for instance, can be interpreted to mean there were $7.85 of sales for every dollar of working capital.

Operating Statistics of Average WD as Percent of Net Sales: AWDA

Figures Apply to 1981 Operating Experience

	Percent of Net Sales
SALES	
Gross Sales, Merchandise	121.83%
Returned Sales & Allowances, Merchandise	—16.93%
Returned Sales & Allowances, Cores	—4.90%
Total Reductions	—21.83%
NET SALES	100.00%
COST OF GOODS SOLD	
Inventory at Beginning of Period	21.86%
Purchases (net after returns)	77.28%
Merchandise Available for Sale	99.14%
Inventory at End of Period	22.75%
COST OF GOODS SOLD	76.39%
GROSS MARGIN	23.61%
OPERATING EXPENSES	
Selling Expenses	4.15%
(These include: salaries and/or commissions for supervisors, countermen, sales trainers; salesmen travel and trade relations costs; vehicle operation and depreciation, supplies; advertising and sales promotion; WATS or leased line to customers.)	
Delivery and Shipping Expenses	2.34%
(These include: salaries and/or wages for supervisors, drivers; drivers' travel costs; vehicle operation and depreciation; supplies; postage; transportation out.)	
Warehouse and Occupancy Expenses	5.60%
(These include: salaries and/or wages for supervisors, warehouse employees, clerical workers; supplies; heat, light, water; rent; depreciation of buildings, land improvements, leasehold improvements, and warehouse fixtures and equipment; repairs and maintenance for buildings, fixtures and equipment.)	
General and Administrative Expenses	6.82%
TOTAL OPERATING EXPENSES	18.91%
OPERATING INCOME	4.70%
OTHER INCOME	1.72%
(These include: cash discounts earned; interest received or accrued; gain on sales of assets; service bureau fees; rental income; dividends from subsidiaries; dividend income; other.)	
OTHER EXPENSE	3.56%
(These include: cash discounts allowed; interest paid or accrued; employees' profit sharing, employees' pension fund expenses.)	
PRETAX INCOME	2.86%

Source: 1982 *AWDA Financial Analysis Report* of the Automotive Warehouse Distributors Association.

Balance Sheet of Median AWDA Distributor—1981

	Median Distributor Pct. of Total Assets
ASSETS	
Current Assets	
Cash	2.62%
Receivables, Net	33.22%
Merchandise Inventories	48.92%
Other Current Assets	.70%
Total Current Assets	85.46%
Property, Plant & Equipment Cost	16.13%
Accumulated Depreciation	—7.14%
Net Property, Plant & Equipment	8.99%
Other Assets	5.55%
Total Assets	100.00%
LIABILITIES	
Current Liabilities	
Notes Payable—Bank	8.26%
Notes Payable—Other	4.16%
Accounts Payable	26.73%
Other Current Liabilities	3.48%
Income Taxes Payable	1.06%
Total Current Liabilities	43.69%
Long Term Debt	
Notes Payable	9.08%
Deferred Ledger Balances	.65%
Branch Inter-company Account	7.23%
Total Long-Term Debt	16.96%
Total Liabilities	60.65%
EQUITY	
Net Worth	39.35%
Total Liabilities and Equity	100.00%

Source: 1982 *AWDA Financial Analysis Report* of the Automotive Warehouse Distributors Association.

Automotive Retail Sales By Year; $290 Billion in 1981

(In Millions)

Year	Motor Vehicle and Miscellaneous Automotive Dealers	Auto and Home Supply Stores	Gasoline Service Stations	Total
1976	118,860	10,894	51,985	181,739
1977	137,091	12,861	56,468	206,420
1978	153,277	14,025	59,663	226,995
1979	161,110	16,144	73,202	250,458
1980	148,799	18,218	94,470	261,887
1981	166,959	20,384	102,808	290,151

Source: U.S. Department of Commerce. Note: Does not include parts, accessory and gasoline sales where other classes of merchandise are the principal products sold, such as general stores. Data above includes any non-automotive products which are sold by automotive retail stores.

AWDA Figures for WD Net Profit, Turnover, Sales Per Employee

Figures Apply to 1981 Operating Experience

Company Size (By Dollar Vol.)	Average Net Sales Volume	Net Profit Before Taxes (Percent)	Days Sales Outstanding Accts. Rec. (Days)	Median Inventory Turns	Sales Per Employee (Dollars)
Under $2,000,000	$ 1,540,705	1.46%	46.47	2.77	$127,507
$2,000,000 to $3,000,000	2,619,221	(.07%)	48.76	2.85	123,002
$3,000,000 to $4,000,000	3,463,785	1.96%	46.26	3.04	142,789
$5,248,151 to $7,000,000	5,284,151	2.80%	45.13	3.41	152,859
$7,000,000 to $10,000,000	8,358,671	3.59%	48.97	3.13	156,764
$10,000,000 & Over	21,509,117	2.92%	45.87	3.99	178,789
All Companies	8,991,398	2.86%	46.64	3.35	165,681

Source: 1982 *AWDA Financial Analysis Report* of the Automotive Warehouse Distributors Association.

MEMA Members Forecast Overall 1982 Sales Increase of 16.1%

	Dollar Sales Forecast 1982 vs. 1981 %	Unit Sales Forecast 1982 vs. 1981 %
PRODUCT GROUP		
Accessories	+11.0	+ 4.9
Autobody Supplies	+15.6	+ 8.4
Chassis Parts	+13.5	+ 6.9
Chemicals	+11.1	+ 6.4
Electrical Systems	+13.9	+ 9.3
Engine Parts	+12.5	+ 6.2
General Service Items	+ 3.0	— 2.2
Tools	+13.1	+ 4.9
Equipment	+15.3	+ 8.4
TOTAL INDUSTRY	+16.1	+ 7.2
% of Industry Forecasting Increase	94.4	83.5
Average Increase	+17.2	+ 9.2
% of Industry Forecasting Decrease	4.7	10.1
Average Decrease	— 7.5	— 6.5
% of Industry Forecasting No Change	.9	6.4
FORECAST BY ANNUAL PRODUCT SALES CATEGORY		
Under $1 million	+14.2	+ 9.9
$1 to $5 million	+14.5	+ 2.1
$5 to $15 million	+11.6	+ 6.3
$15 million and over	+17.0	+ 7.3

Source: Motor & Equipment Manufacturers Association.

1980 Motor Bus Registration

	Private and Commercial		Publicly Owned		Total School	Total
	Commercial Buses[1]	School and Other[2]	Federal	School[3]	Buses	Buses
Alabama	1,736	816	28	6,136	6,952	8,716
Alaska	680	470	47	260	730	1,457
Arizona	827	209	350	2,493	2,702	3,879
Arkansas	42	1,395	17	4,082	5,477	5,536
California	12,179	3,034	283	8,781	11,815	24,277
Colorado	592	861	53	4,203	5,064	5,709
Connecticut	1,921	5,748	22	602	6,350	8,293
Delaware	343	1,085	4	145	1,230	1,577
Florida	3,068	1,147	101	24,944	26,091	29,260
Georgia	1,240	2,498	78	8,738	11,236	12,554
Hawaii	2,128	553	20	531	1,084	3,232
Idaho	290	368	147	2,000	2,368	2,805
Illinois	6,394	12,766	59	4,265	17,031	23,484
Indiana	4,330	4,469	31	8,478	12,947	17,308
Iowa	969	—	11	7,058	7,058	8,038
Kansas	400	1,047	6	2,462	3,509	3,915
Kentucky	655	552	61	6,810	7,362	8,078
Louisiana	1,264	14,387	21	4,116	18,503	19,788
Maine	209	495	25	1,827	2,322	2,556
Maryland	2,531	3,894	93	3,524	7,418	10,042
Massachusetts	3,885	7,236	15	482	7,718	11,618
Michigan	2,678	4,418	28	11,747	16,165	18,871
Minnesota	1,914	3,999	33	11,147	15,146	17,093
Mississippi	1,032	2,295	59	5,166	7,461	8,552
Missouri	903	2,821	84	6,081	8,902	9,889
Montana	366	763	109	837	1,600	2,075
Nebraska	511	757	8	2,246	3,003	3,522
Nevada	275	130	90	1,031	1,161	1,526
New Hampshire	313	851	6	242	1,093	1,412
New Jersey	4,560	4,912	43	3,414	8,326	12,929
New Mexico	538	2,354	419	403	2,757	3,714
New York	13,299	7,411	101	11,995	19,406	32,806
North Carolina	1,761	7,417	47	17,173	24,590	26,398
North Dakota	97	448	33	1,333	1,781	1,911
Ohio	7,440	3,700	37	15,937	19,637	27,114
Oklahoma	320	1,616	117	8,421	10,037	10,474
Oregon	1,066	2,161	57	5,219	7,380	8,503
Pennsylvania	8,409	12,976	94	5,294	18,270	26,773
Rhode Island	312	1,016	5	284	1,300	1,617
South Carolina	885	2,400	14	7,725	10,125	11,024
South Dakota	297	415	42	2,248	2,663	3,002
Tennessee	1,679	1,510	41	7,144	8,654	10,374
Texas	3,243	11,029	176	17,083	28,112	31,531
Utah	304	79	79	690	769	1,152
Vermont	99	404	9	752	1,156	1,264
Virginia	2,337	40	106	10,791	10,831	13,274
Washington	514	2,170	182	7,046	9,210	9,912
West Virginia	1,055	7	21	2,557	2,564	3,640
Wisconsin	1,529	5,725	31	3,749	9,474	11,034
Wyoming	1,112	144	1	1,237	1,381	2,404
Dist. of Columbia	2,290	35	211	263	208	2,799
Total	106,821	147,033	3,755	271,192	418,225	528,801

Source: U.S. Federal Highway Administration. [1]Includes municipally owned transit buses. [2]In some instances church, industrial and other private buses are included here; and in other instances privately owned school buses could not be segregated from commercial buses, and are included with the latter. [3]This column consists primarily of publicly owned school buses but includes a few privately owned institutional and industrial buses registered free or at a reduced rate.

Parts, Service Sales of Franchised Car & Truck Dealers: $23.4 Billion

SERVICE LABOR SALES	1980	1981	Percentage Change 1980 to 1981
Customer Mechanical	$ 4,031,000,000	$ 4,217,000,000	+ 4.6%
Customer Body	2,068,000,000	2,215,000,000	+ 7.1%
Warranty	1,525,000,000	1,459,000,000	— 4.3%
Sublet	752,000,000	767,000,000	+ 2.0%
Internal	1,096,000,000	1,289,000,000	+17.6%
Other Sales	971,000,000	703,000,000	—27.6%
Total Service Labor	10,442,000,000	10,650,000,000	+ 2.0%
PARTS SALES			
Customer Mechanical	$ 2,635,000,000	$ 2,729,000,000	+ 3.6%
Customer Body	1,728,000,000	1,760,000,000	+ 1.9%
Wholesale	3,788,000,000	4,042,000,000	+ 6.7%
Counter	809,000,000	854,000,000	+ 5.6%
Warranty	1,140,000,000	1,148,000,000	+ 0.7%
Internal	1,410,000,000	1,517,000,000	+ 7.6%
Other Sales	748,000,000	701,000,000	— 6.3%
Total Parts	12,258,000,000	12,750,000,000	+ 4.0%
TOTAL SERVICE & PARTS	22,700,000,000	23,400,000,000	+ 3.1%

Source: Economic Analysis Department, National Automobile Dealers Association.

What It Costs to Own, Operate Average Car In 1982

Figures Based on Compact-Sized Car

Cost Per Mile

Cost Item	1982
Gasoline (unleaded) and oil	6.74 cents
Tires	.63 cents
Maintenance	1.00

Fixed Costs

	Annually
Comprehensive insurance ($100 ded.)	$ 53.00
$250 deductable collision insurance	$ 153.00
Property damage and liability ($100/300/50M)	$ 243.00
License, registration, taxes	$ 54.00
Depreciation	$1,356.00
Finance charge (20% down, 15% for 4 years)	$ 539.00
	$2,398.00
	(or $6.57 per day)
TOTAL COST PER MILE	24.4 cents
TOTAL COST PER YEAR	$3,654.00

Source: *American Automobile Association*. 1982 cost figures for this report were based on a 1982 Chevrolet, 6-cylinder, 173 cu. in. engine, Citation 4-door hatchback with standard accessories, automatic transmission, power steering, power disc brakes and radio, driven up to 15,000 miles per year. Gasoline costs are based on $1.45 per gallon. Insurance is based on a pleasure use category where the vehicle is driven less than 10 miles to or from work and there is no youthful driver. AAA notes that while figures are based on a national average, there are variations depending on auto size and whether it is operated in a high-cost or low-cost area.

Average Fuel Use Per Vehicle

(Gallons)

			BUSES			TRUCKS			
	Passenger cars	Motorcycles	Commercial Buses	School Buses	All Buses	Single Unit Trucks	Truck Combinations	All Trucks	All Motor Vehicles
1980	503	63	6,516	994	2,034	907	7,764	1,194	711
1979	564	80	5,872	976	1,966	892	9,197	1,225	765
1978	715	90	6,051	1,020	2,041	916	9,141	1,270	813
1977	706	90	5,955	1,019	2,002	928	9,263	1,284	804
1976	711	90	5,926	1,022	2,015	938	8,961	1,292	807
1975	712	90	5,896	929	1,937	887	8,633	1,227	790
1974	704	90	5,827	933	1,919	897[3]	9,310	1,268	788
1970	735	48	7,132	1,039	2,491	969	8,711	1,365	830
1965	667	50	7,588	1,086	2,844	964	8,172	1,347	775
1960[1]	661	[2]	8,132	1,066	3,040	—	——	1,330	777
1955	644	—	6,807	750	3,021	—	——	1,278	759
1950	603	—	7,300	748	3,752	—	——	1,257	728
1940	594	—	6,796	775	3,049	—	——	1,097	678

Source: U.S. Federal Highway Administration, *Highway Statistics*, annual. [1]Alaska and Hawaii included for the first time in 1959. [2]Motorcycles are included in passenger cars. [3]Not comparable to previous years.

Imported New Car Sales In U.S. since 1976

	1981	1980	1979	1978	1977	1976
Alfa Romeo	2,301	3,000	4,011	6,237	6,712	5,283
Audi	50,817	42,483	42,709	40,878	35,854	33,316
BMW	41,761	37,017	34,521	31,457	28,776	26,040
Capri	——	——	——	4,079	22,458	29,904
Challenger	12,690	12,924	14,166	17,649	1,832	——
Arrow/Champ	42,128	55,474	48,860	28,296	47,345	30,430
Colt	42,796	50,689	62,705	44,570	70,679	48,542
Datsun	464,805	516,890	472,252	338,096	388,378	270,103
DeLorean	3,009	——	——	——	——	——
Ferrari	N.A.	779	679	617	N.A.	N.A.
Fiat	32,185	37,184	58,934	60,435	63,479	61,540
Fiesta	32,856	68,595	78,109	76,145	40,549	——
Honda	370,705	375,388	353,291	274,876	223,633	150,929
Isuzu	17,805					
Jaguar	4,695	3,029	3,746	4,782	4,349	7,384
Lancia	1,068	2,100	1,602	2,811	5,500	——
Mazda	166,105	161,623	156,533	75,309	50,609	35,383
Mercedes-Benz	63,059	53,790	52,819	46,695	48,722	43,205
MG	3,712	13,730	26,025	26,656	34,794	28,436
Opel	——	——	13,815	19,222	29,067	10,483
Peugeot	16,937	12,930	11,688	9,061	10,002	9,497
Porsche	11,241	10,490	13,818	17,017	19,896	14,192
Renault	30,869	25,365	18,862	15,739	13,198	6,880
Rolls-Royce	781	942	1,002	1,109	N.A.	N.A.
Rover	——	481	——	——	——	——
Saab	14,613	13,558	15,142	15,662	13,120	9,866
Sapporo	13,326	10,263	12,322	12,777	1,406	——
Subaru	152,062	142,968	127,871	103,274	80,826	48,928
Toyota	576,491	582,204	507,816	441,800	493,048	346,920
Triumph	9,768	14,939	12,733	16,447	29,258	28,232
Volkswagen	82,173	90,923	125,100	216,709	260,704	201,670
Volvo	64,477	56,999	56,027	50,880	46,790	43,887
TOTAL	2,325,235	2,396,934	2,327,932	2,000,500	2,071,100	1,493,000

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1977 Census of Business Report On Automotive Repair Shops[1]

	All Establishments		Establishments With Payroll	
	Number	Receipts (Add 000)	Number	Receipts (Add 000)
Automotive Repair Shops	154,194	12,770,413	80,741	11,283,484
General Automotive Repair Shops	86,991	5,633,332	37,240	4,641,340
General Automotive Repair Shops, Ex. Diesel	[2]	[2]	35,153	4,032,177
Diesel Repair Shops	[2]	[2]	2,087	609,163
Top and Body Repair Shops	38,848	3,245,985	22,584	2,907,033
Other Automotive Repair Shops	28,355	3,891,096	20,917	3,735,111
Tire Retreading and Repair Shops	[2]	[2]	1,825	709,665
Paint Shops	[2]	[2]	2,777	436,261
Auto Electrical and Fuel System Services	[2]	[2]	1,676	248,696
Radiator Repair	[2]	[2]	1,999	282,333
Glass Replacement and Repair	[2]	[2]	2,120	452,425
Brake, Front End and Wheel Alignment	[2]	[2]	2,349	387,220
Exhaust System Services (Muffler Shops)	[2]	[2]	1,697	366,966
Transmission Repair Shops	[2]	[2]	5,527	653,205
Other Automotive Repair Shops Not Elsewhere Classified	[2]	[2]	947	198,340

Source: U.S. Census of Business (1977). [1]This table refers to automotive repair shops apart from gasoline service stations and the repair departments of motor vehicle dealers. The government considers service stations and vehicle dealers as retail establishments rather than service establishments; as retail establishments they are reported elsewhere in the U.S. Census of Business. [2]Data not provided because establishments with no payroll are classified only at the next broader kind-of-business level.

United States Car Production By Model Year, 1958 to 1981

Year	Cars	Year	Cars
1981	6,639,954	1969	8,440,765
1980	7,085,480	1968	8,402,870
1979	9,526,024	1967	7,666,898
1978	8,995,418	1966	8,606,166
1977	9,159,100	1965	7,882,679
1976	8,114,376	1964	7,892,090
1975	6,523,880	1963	7,339,992
1974	8,125,488	1962	6,686,749
1973	9,915,802	1961	5,407,256
1972	8,589,049	1960	6,011,482
1971	7,221,290	1959	5,566,527
1970	7,595,411	1958	4,222,781

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World's Major Producers of Cars, Trucks and Buses

Rank	(1980)	Company	Nationality	Cars 1981	Trucks and Buses 1981	Total 1981	Total 1980
1.	(1)	General Motors	U.S.A.	3,925,679	687,163	4,612,842	4,729,551
2.	(2)	Toyota	Japan	2,240,000	1,050,000	3,290,000	3,220,000
3.	(3)	Nissan	Japan	1,864,000	950,000	2,814,000	2,590,000
4.	(8)	Ford	U.S.A.	1,320,197	617,375	1,937,572	1,888,456
5.	(6)	Volkswagen Grp.	West Germany	1,462,231	82,258	1,544,489	1,631,807
6.	(4)	Renault	France	1,295,713	230,902	1,526,615	1,713,185
7.	(5)	Peugeot	France	1,316,151	168,310	1,484,461	1,647,221
8.	(7)	Fiat-Group	Italy	1,120,000	110,000	1,230,000	1,522,000
9.	(9)	Mazda	Japan	830,000	400,000	1,230,000	1,043,000
10.	(11)	Honda	Japan	945,000	100,000	1,045,000	875,000
11.	(10)	Mitsubishi	Japan	650,000	350,000	1,000,000	915,000
12.	(13)	Lada	U.S.S.R.	750,000	100,000	850,000	800,000
13.	(14)	Chrysler	U.S.A.	749,687	98,240	847,927	757,932
14.	(12)	Opel	West Germany	810,158	6,490	816,648	792,800
15.	(16)	General Motors	Canada	478,389	278,743	757,132	769,040
16.	(15)	Daimler-Benz	West Germany	449,010	183,270	632,280	627,221
17.	(20)	Subaru	Japan	375,640	225,000	582,640	550,000
18.	(21)	Ford	United Kingdom	327,120	220,000	547,120	481,104
19.	(17)	BL	United Kingdom	420,100	120,000	540,100	518,231
20.	(19)	Isuzu	Japan	130,000	390,000	512,000	500,000
21.	(22)	Ford	West Germany	486,917	———	486,917	419,517
22.	(25)	Daihatsu	Japan	160,000	275,000	435,000	375,000
23.	(24)	GAZ (Volga)	U.S.S.R.	145,000	250,000	395,000	395,000
24.	(26)	Suzuki	Japan	90,000	270,000	360,000	355,000
25.	(29)	BMW	West Germany	337,757	———	337,757	330,087
26.	(23)	Ford	Canada	209,494	122,437	331,931	434,311
27.	(18)	Volkswagen	Brazil	250,000	75,000	325,000	514,237
28.	(30)	Polski Fiat	Poland	256,000	———	256,000	320,000
29.	(32)	Ford	Spain	253,751	———	253,751	265,839
30.	(35)	Volvo	Sweden	212,000	32,000	244,000	218,000
31.	(34)	Moskwich	U.S.S.R.	230,000	———	230,000	230,000
32.	(37)	Skoda	Czechoslovakia	180,000	30,000	210,000	215,000
33.	(27)	FASA-Renault	Spain	208,552	———	208,552	343,678
34.	(38)	Volkswagen	U.S.A.	167,829	37,379	205,208	197,106
35.	(28)	American Motors	U.S.A.	109,319	95,864	205,183	288,844
36.	(31)	SEAT	Spain	200,000	———	200,000	297,632
37.	(36)	Alfa-Romeo	Italy	190,000	———	190,000	218,000
38.	(33)	General Motors	Brazil	128,000	48,000	176,000	231,557
39.	(43)	Zastava	Yugoslavia	153,000	12,000	165,000	150,000
40.	(39)	Vauxhall	United Kingdom	70,197	80,000	150,197	183,509
41.	(42)	ZAZ	U.S.S.R.	150,000	———	150,000	140,000
42.	(45)	GM-Holden	Australia	132,000	15,000	147,000	122,900
43.	(41)	Fiat	Brazil	128,000	6,000	134,000	165,000
44.	(46)	Volkswagen	Mexico	121,000	———	121,000	119,500
45.	(49)	Ford	Australia	108,158	12,500	120,658	97,100
46.	(47)	Trabant	East Germany	120,000	———	120,000	110,000
47.	(40)	Ford	Brazil	86,900	32,000	118,900	165,456
48.	(50)	Saab-Scania	Sweden	74,000	27,000	101,000	94,000
49.	(44)	Citroen/Talbot	Spain	100,500	———	100,500	131,393
50.	(—)	Nissan	Mexico	75,000	20,000	95,000	72,000

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U.S. Car Production:

	Total Output 1981	Pct. of Total Output	Total Output 1980	Pct. of Total Output	Pct. Pt. Change '81 vs. '80
AMC	109,319	1.74	164,765	2.57	— 0.83
Eagle	24,696	0.39	42,158	0.66	— 0.27
Concord	49,480	0.79	68,384	1.06	— 0.27
Spirit	35,143	0.56	54,223	0.85	— 0.29
CHRYSLER	749,687	11.94	638,535	9.95	+ 1.99
Plymouth Total	365,841	5.83	293,100	4.56	+ 1.27
Horizon	139,353	2.22	144,811	2.25	— 0.03
Volare	.....	.....	51,735	0.81	— 0.81
Gran Fury	7,448	0.12	14,468	0.22	— 0.10
Caravelle	2,139	0.04	6,277	0.10	— 0.06
Reliant	216,901	3.45	75,809	1.18	+ 2.27
Chrysler Total	57,340	0.91	82,440	1.30	— 0.39
Chrysler	4,862	0.08	19,858	0.30	— 0.22
LeBaron	52,478	0.83	62,582	1.00	— 0.17
Dodge Total	326,506	5.20	262,995	4.09	+ 1.11
Omni	126,224	2.01	121,544	1.90	+ 0.11
St. Regis	3,682	0.06	13,181	0.20	— 0.14
Diplomat	12,644	0.20	30,733	0.47	— 0.27
Aspen	.....	.....	36,881	0.57	— 0.57
Aries	170,139	2.71	60,656	0.95	+ 1.76
Dodge 400	13,817	0.22	.....	.....	+ 0.22
FORD MOTOR	1,320,198	21.02	1,306,948	20.37	+ 0.65
Ford Division	892,043	14.20	929,627	14.49	— 0.29
Pinto	.....	.....	68,179	1.06	— 1.06
Mustang	153,719	2.45	232,507	3.62	— 1.17
Fairmont	176,246	2.81	198,219	3.09	— 0.28
Granada	103,702	1.65	113,281	1.77	— 0.12
T-Bird	64,328	1.02	117,856	1.84	— 0.82
Ford	40,886	0.65	91,135	1.42	— 0.77
Escort	351,437	5.59	108,450	1.69	+ 3.90
EXP	1,725	0.03	.....	.....	+ 0.03
L-M Division	428,155	6.82	377,321	5.88	+ 0.94
Mercury Total	363,970	5.80	324,528	5.06	+ 0.74
Bobcat	.....	.....	12,445	0.19	— 0.19
Capri	50,336	0.80	68,070	1.06	— 0.26
Zephyr	51,868	0.83	66,657	1.04	— 0.21
Monarch '80	.....	.....	16,445	0.26	— 0.26
XR-7	28,223	0.45	42,927	0.66	— 0.21
Cougar	49,831	0.79	24,819	0.40	+ 0.39
Mercury	65,720	1.05	55,524	0.87	+ 0.18
Lynx	116,905	1.86	37,641	0.58	+ 1.28
LN7	1,087	0.02	.....	.....	+ 0.02
Lincoln Total	64,185	1.02	52,793	0.82	+ 0.20
Lincoln	26,651	0.42	2,278	0.36	+ 0.06
Versailles	.....	.....	1,866	0.02	— 0.02
Mark VI	25,640	0.41	28,146	0.44	— 0.03
Continental	11,894	0.10	———	.....	+ 0.19

1981 Compared to 1980

	Total Output 1981	Pct. of Total Output	Total Output 1980	Pct. of Total Output	Pct. Pt. Change '81 vs. '80
GENERAL MOTORS	3,930,176	62.58	4,106,191	63.99	— 1.41
Buick Division	839,966	13.37	783,575	12.21	+ 1.16
Skyhawk	6	.....	.....	.....	.....
Skylark	239,175	3.81	218,502	3.41	+ 0.40
Century	102,968	1.64	164,941	2.57	— 0.93
Regal	267,708	4.26	205,939	3.21	+ 1.05
Buick	171,834	2.74	149,668	2.23	+ 0.41
Riviera	58,275	0.92	44,525	0.69	+ 0.23
Cadillac Division	259,135	4.13	203,991	3.18	+ 0.95
Seville	23,344	0.37	34,300	0.53	— 0.16
Cadillac	155,622	2.48	115,424	1.80	+ 0.68
Eldorado	57,861	0.92	54,267	0.85	+ 0.07
Cimarron	22,308	0.36	.....	.....	+ 0.36
Chevrolet Division	1,463,165	23.30	1,760,030	27.43	— 4.13
Chevette	360,848	5.75	454,051	7.07	— 1.32
Monza	.....	.....	150,548	2.35	— 2.35
Camaro	99,050	1.58	118,211	1.84	— 0.26
Citation	300,653	4.79	459,276	7.16	— 2.37
Malibu	223,749	3.56	273,371	4.26	— 0.70
Monte Carlo	139,899	2.23	125,474	1.96	+ 0.27
Chevrolet	147,332	2.35	134,909	2.10	+ 0.25
Corvette	127,984	0.45	44,190	0.69	— 0.24
Cavalier	139,817	2.22	.....	.....	+ 2.22
Celebrity	23,833	0.37	.....	.....	+ 0.37
Oldsmobile Division	825,540	13.14	783,320	12.20	+ 0.94
Omega	121,617	1.94	115,677	1.80	+ 0.14
Cutlass	361,640	5.76	395,784	6.16	— 0.40
Oldsmobile	274,373	4.37	233,845	3.64	+ 0.73
Toronado	43,875	0.69	37,924	0.60	+ 0.09
Cutlass-Ciera	24,036	0.38	.....	.....	+ 0.38
Pontiac Division	542,370	8.64	575,365	8.97	— 0.33
Acadian[1]	18,138	0.29	18,974	0.30	— 0.01
Sunbird	.....	.....	149,239	2.33	— 2.33
Phoenix	96,597	1.54	136,180	2.12	— 0.58
Firebird	48,970	0.77	79,568	1.24	— 0.47
LeMans	42,027	0.67	64,864	1.01	— 0.34
Grand Prix	97,051	1.55	76,019	1.18	+ 0.37
Pontiac	10,064	0.16	50,521	0.79	— 0.63
J-2000	91,465	1.46	.....	.....	+ 1.46
T-1000	88,871	1.42	.....	.....	+ 1.42
Bonneville-G	30,176	0.48	.....	.....	+ 0.48
6000	19,011	0.30	.....	.....	+ 0.30
VOLKSWAGEN	167,755	2.67	197,106	3.07	— 0.40
CHECKER	2,910	0.50	3,340	0.05	.....
Total U.S. Cars	6,280,045	100.00	6,416,885	100.0	.....

Source: Reprinted with permission from *Automotive News*. Copyright 1982.
[1]All Acadians are built for sale in Canada only.

United States Shipments

Year	Total Shipments	Travel Trailers: Conventional	Travel Trailers: Fifth Wheel[2]	Truck Campers
1980	181,400[1]	42,800	6,300	5,000
1979	307,700	74,700	15,500	13,800
1978	526,300	132,700	27,100	24,700
1977	533,900	145,900	22,000	31,900
1976	541,100	168,300	21,400	42,000
1975	339,600	134,000	16,600	44,300
1974	295,800	113,700	12,600	45,400
1973	528,800	190,500	21,800	89,800
1972	582,979	235,500	15,379	105,100
1971	451,000	190,800		107,200
1970	380,300	139,000		95,900
1969	400,600	144,000		92,500
1968	333,100	115,200		79,500
1967	244,430	94,500		61,600
1966	219,810	87,300		54,500
1965	192,830	76,600		44,300
1964	151,000	64,200		34,800
1963	118,600	51,500		26,800
1962	80,300	40,600		16,700
1961	62,600	28,800		15,800

Source: Recreational Vehicle Association. [1]Includes 2,900 park trailers. [2]To be towed by pickup truck with fifth-wheel hitch mounted in the truck bed.

Scrappage of Motor Vehicles

(During One-Year Periods Ending June 30)

	Passenger Cars	Trucks	Cars & Trucks
July 1, 1956 - June 30, 1957	4,309,153	630,303	4,939,456
July 1, 1957 - June 30, 1958	4,221,607	502,245	4,723,852
July 1, 1958 - June 30, 1959	2,981,641	372,085	3,353,726
July 1, 1959 - June 30, 1960	4,348,719	690,568	5,039,287
July 1, 1960 - June 30, 1961	4,294,118	646,791	4,940,909
July 1, 1961 - June 30, 1962	4,360,774	575,903	4,936,677
July 1, 1962 - June 30, 1963	4,741,017	720,039	5,461,056
July 1, 1963 - June 30, 1964	5,319,286	779,870	6,099,156
July 1, 1964 - June 30, 1965	5,704,373	735,975	6,440,348
July 1, 1965 - June 30, 1966	6,173,512	1,073,593	7,247,105
July 1, 1966 - June 30, 1967	6,984,214	946,649	7,930,863
July 1, 1967 - June 30, 1968	6,200,017	860,542	7,060,559
July 1, 1968 - June 30, 1969	6,348,488	966,003	7,314,491
July 1, 1969 - June 30, 1970	7,460,984	837,173	8,298,157
July 1, 1970 - June 30, 1971	6,021,041	1,043,877	7,064,918
July 1, 1971 - June 30, 1972	7,058,029	1,048,031	8,106,060
July 1, 1972 - June 30, 1973	7,987,384	1,207,536	9,194,920
July 1, 1973 - June 30, 1974	7,193,679	1,047,207	8,240,886
July 1, 1974 - June 30, 1975	5,668,708	907,699	6,576,407
July 1, 1975 - June 30, 1976	6,828,903	1,097,457	7,926,360
July 1, 1976 - June 30, 1977	8,233,925	1,667,653	9,901,578
July 1, 1977 - June 30, 1978	7,907,075	1,426,294	9,333,369
July 1, 1978 - June 30, 1979	9,312,274	1,916,142	11,228,416
July 1, 1979 - June 30, 1980	8,404,993	1,731,670	10,136,663
July 1, 1980 - June 30, 1981	7,542,480	1,518,546	9,061,026

Source: R. L. Polk & Co., Motor Statistical Division. Note: Adjustments for the absence of Oklahoma and other states have been made where applicable.

Of Recreational Vehicles

Year	Motor Homes: Conventional	Motor Homes: Type B-1 Van Camper[1]	Motor Homes: Multi-Use Van Conversions	Motor Homes: Type C Chopped Van	Camping Trailers
1980	9,800	2,400	70,800	16,400	24,500
1979	21,500	3,400	108,500	39,200	31,000
1978	46,600	19,500	136,400	91,100	48,200
1977	43,000	40,800	120,000	76,400	53,900
1976	45,200	36,100	100,000	74,800	53,300
1975	30,300	26,400	N.A.	39,900	48,100
1974	26,700	20,800	N.A.	21,400	55,200
1973	65,300	27,000	N.A.	36,700	97,700
1972	64,600	23,800	N.A.	28,400	110,200
1971			57,200		95,800
1970			30,300		116,100
1969			23,100		141,000
1968			13,200		125,200
1967			9,050		79,280
1966			5,710		72,300
1965			4,710		67,220
1964			N.A.		52,000
1963			N.A.		40,300
1962			N.A.		23,000
1961			N.A.		18,000

[1]Panel type trucks with interior converted to a living area. "N.A." means not available.

Annual Factory Sales of Motor Vehicles From U.S. Plants

	Passenger Cars	Motor Trucks and Buses	Total Vehicles
1981	6,255,340	1,700,908	7,956,248
1980	6,400,026	1,667,283	8,067,309
1979	8,419,226	3,036,706	11,455,932
1978	9,165,190	3,706,239	12,871,429
1977	9,200,849	3,441,521	12,642,370
1976	8,500,305	2,979,476	11,479,781
1975	6,712,852	2,272,160	8,985,012
1974	7,331,256	2,727,313	10,058,569
1973	9,657,647	2,979,688	12,637,335
1972	8,823,938	2,446,807	11,270,745
1971	8,584,592	2,053,146	10,637,738
1970	6,546,817	1,692,440	8,239,257
1969	8,223,715	1,923,179	10,146,894
1968	8,822,158	1,896,078	10,718,236
1967	7,436,764	1,539,462	8,976,226
1966	8,598,326	1,731,084	10,329,410
1965	9,305,561	1,751,805	11,057,366
1964	7,751,822	1,540,453	9,292,275
1963	7,637,728	1,462,708	9,100,436
1962	6,933,240	1,240,168	8,173,408
1961	5,542,707	1,133,804	6,676,511
1960	6,674,796	1,194,475	7,869,271
1959	5,591,243	1,137,386	6,728,629
1958	4,257,812	877,294	5,135,106
1957	6,113,344	1,107,176	7,220,520
1956	5,816,109	1,104,481	6,920,590
1955	7,920,186	1,249,106	9,169,292

Source: Motor Vehicle Manufacturers Association of the U.S., Inc. Prior to July 1, 1964, some firms included tactical vehicles in factory sales. Since July 1, 1964, all tactical vehicles are excluded.

MEMA's "Composite" Wholesaler

ASSETS	1980	1979	1978
Cash	9.2%	6.9%	7.8%
Accounts Receivable	21.4%	22.8%	24.3%
Inventory	50.3%	49.2%	48.3%
Total Current Assets	80.9%	78.9%	80.4%
Deferred Assets	19.1%	21.1%	19.6%
Total Assets	100.0%	100.0%	100.0%
LIABILITIES & NET WORTH			
Current Debt	31.2%	34.5%	37.4%
Long Term Debt	16.9%	20.1%	15.5%
Net Worth	51.9%	45.4%	47.1%
Total Debt & Net Worth	100.0%	100.0%	100.0%
FINANCIAL RATIOS			
Collection Period—Days	40	41	41
Quick Ratio	.98	.86	.86
Current Ratio	2.59	2.27	2.14
Inventory to Working Capital	101.0%	111.0%	112.5%
Inventory to Current Assets	62.1%	62.4%	60.1%
Current Debt to Inventory	62.0%	70.3%	77.6%
Current Debt to Net Worth	60.0%	76.2%	79.8%
Total Debt to Net Worth	94.5%	120.7%	112.9%
PROFIT & LOSS STATEMENT			
Net Sales	100.0%	100.0%	100.0%
Cost of Goods Sold	66.2%	66.6%	68.5%
Gross Profit	33.8%	33.4%	31.5%
Expenses[1]	31.0%	30.5%	28.5%
Net Profit After Taxes	2.8%	2.9%	3.0%
OPERATING RATIOS			
Gross Profit to Sales	33.8%	33.4%	31.5%
Net Profit to Sales	2.8%	2.9%	3.0%
Net Profit to Net Worth	12.5%	13.5%	13.9%
Net Profit to Working Capital	13.0%	13.8%	15.2%
Net Profit to Total Assets	6.5%	6.1%	6.5%
EFFICIENCY RATIOS			
Net Sales to Net Worth	4.4	4.5	4.6
Net Sales to Working Capital	4.6	4.6	5.0
Inventory Turnover	3.1	2.8	3.1
Net Sales to Total Assets	2.3	2.0	2.2

Source: 1981 Edition of the *Automotive Distributor Trends and Financial Analysis*, published by the Motor & Equipment Manufacturers Association.
[1]Includes net of other income, deductions and taxes.

MEMA's Profile of Average WD

ASSETS	1980	1979	1978
Cash	4.5%	3.0%	2.8%
Accounts Receivable	29.9%	30.9%	32.6%
Inventory	46.3%	49.6%	47.9%
Total Current Assets	80.7%	83.5%	83.3%
Deferred Assets	19.3%	16.5%	16.7%
Total Assets	100.0%	100.0%	100.0%
LIABILITIES & NET WORTH			
Current Debt	51.2%	54.9%	49.6%
Long Term Debt	10.2%	12.0%	14.7%
Net Worth	38.6%	33.1%	35.7%
Total Debt & Net Worth	100.0%	100.0%	100.0%
FINANCIAL RATIOS			
Collection Period—Days	51	50	51
Quick Ratio	.67	.62	.71
Current Ratio	1.57	1.52	1.68
Inventory to Working Capital	157.3%	173.7%	141.9%
Inventory to Current Assets	57.4%	59.4%	57.5%
Current Debt to Inventory	110.7%	110.8%	103.5%
Current Debt to Net Worth	132.6%	166.3%	138.9%
Total Debt to Net Worth	159.1%	202.6%	180.0%
PROFIT & LOSS STATEMENT			
Net Sales	100.0%	100.0%	100.0%
Cost of Goods Sold	74.5%	75.7%	77.0%
Gross Profit	25.5%	24.3%	23.0%
Expenses[1]	23.5%	22.3%	20.8%
Net Profit After Taxes	2.0%	2.0%	2.2%
OPERATING RATIOS			
Gross Profit to Sales	25.5%	24.3%	23.0%
Net Profit to Sales	2.0%	2.0%	2.2%
Net Profit to Net Worth	12.7%	13.5%	14.6%
Net Profit to Working Capital	16.7%	15.6%	15.4%
Net Profit to Total Assets	4.9%	4.4%	5.2%
EFFICIENCY RATIOS—TIMES			
Net Sales to Net Worth	6.4	6.9	6.5
Net Sales to Working Capital	8.4	7.9	6.9
Inventory Turnover	3.9	3.5	3.7
Net Sales to Total Assets	2.4	2.3	2.3

Source: 1981 Edition of the *Automotive Distributor Trends and Financial Analysis*, published by the Motor & Equipment Manufacturers Association.
[1]Includes net of other income, deductions and taxes.

ASIA Manufacturers' Sales

By Size of Company[1]

All Figures Expressed in Percentages

PCT. OF AUTOM. SALES	Gr. 1 (Pct.)	Gr. 2 (Pct.)	Gr. 3 (Pct.)	Gr. 4 (Pct.)	Gr. 5 (Pct.)	Gr. 6 (Pct.)	Gr. 7 (Pct.)	Gr. 8 (Pct.)	Over-all Industry (Pct.)
—Direct to Whslrs.									
Avg. of Tot. Sls.	31.16	13.46	16.40	10.60	24.53	3.52	.40	8.87	11.84
Firms selling 100 Pct.	0.00	0.00	0.00	6.67	5.56	0.00	0.00	0.00	2.17
Firms selling nothing	25.00	36.36	40.00	60.00	27.78	54.55	80.00	71.43	54.35
—Thru Redist. Whslrs.									
Avg. of Tot. Sls.	0.00	9.45	4.60	1.53	3.28	5.95	5.40	8.60	4.97
Firms selling 100 Pct.	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Firms selling nothing	50.00	0.00	0.00	26.67	22.22	9.09	0.00	28.57	14.13
—Thru WDs									
Avg. of Tot. Sls.	23.48	53.70	31.60	38.67	36.44	61.55	55.80	37.16	47.83
Firms selling 100 Pct.	0.00	0.00	0.00	6.67	5.56	0.00	0.00	0.00	4.35
Firms selling nothing	50.00	0.00	0.00	26.67	22.22	9.09	0.00	28.57	14.13
—Thru HD Dist.									
Avg. of Tot. Sls.	0.00	2.96	9.00	8.47	8.92	1.16	15.20	1.31	5.85
Firms selling 100 Pct.	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Firms selling nothing	100.00	54.55	80.00	66.67	72.22	63.64	40.00	71.43	64.13
—Thru Other Replacement Outlets									
Avg. of Tot. Sls.	0.00	8.59	5.00	8.67	16.10	8.45	2.00	14.20	8.91
Firms selling 100 Pct.	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Firms selling nothing	100.00	54.55	80.00	73.33	55.56	18.18	60.00	42.86	46.74
—Thru Other Independent Mfrs.									
Avg. of Tot. Sls.	11.68	.53	18.80	5.50	1.69	1.55	7.80	1.44	4.00
Firms selling 100 Pct.	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Firms selling nothing	75.00	81.82	40.00	86.67	88.89	72.73	60.00	71.43	71.74

U.S. Battery Shipments by Year

Year	Replacement	Original Equipment	Total Number
1976	49,202,906	12,551,090	61,753,996
1977	54,600,707	14,717,697	69,318,404
1978	56,389,494	15,192,304	71,581,798
1979	53,746,314	14,389,748	68,136,062
1980	50,063,224	10,018,409	60,081,633
1981	53,597,906	10,005,102	63,603,008

Source: Battery Council International.

And Distribution Practices

PCT. OF AUTOM. SALES	Gr. 1 (Pct.)	Gr. 2 (Pct.)	Gr. 3 (Pct.)	Gr. 4 (Pct.)	Gr. 5 (Pct.)	Gr. 6 (Pct.)	Gr. 7 (Pct.)	Gr. 8 (Pct.)	Over-all Industry (Pct.)
—To Remanufacturers									
Avg. of Tot. Sls.	18.75	4.64	5.00	1.63	.45	8.36	2.40	.12	3.26
Firms selling 100 Pct.	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Firms selling nothing	75.00	90.91	80.00	73.33	88.89	72.73	60.00	85.71	84.25
—To OEM									
Avg. of Tot. Sls.	1.25	2.44	3.20	14.87	3.25	5.60	9.40	23.64	7.29
Firms selling 100 Pct.	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Firms selling nothing	75.00	72.73	80.00	40.00	66.67	27.27	60.00	28.57	51.09
—To Export									
Avg. of Tot. Sls.	.33	.82	6.00	4.80	2.78	2.52	1.40	3.13	3.01
Firms selling 100 Pct.	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Firms selling nothing	50.00	72.73	40.00	40.00	55.56	54.55	40.00	28.57	43.48
—To Government									
Avg. of Tot. Sls.	.67	0.00	.23	.20	1.53	.72	.33	.20	.69
Firms selling 100 Pct.	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Firms selling nothing	100.00	72.73	80.00	66.67	72.22	63.64	80.00	71.43	71.74
—To All Other									
Avg. of Tot. Sls.	13.35	3.18	.20	3.73	1.84	1.01	0.00	.84	2.39
Firms selling 100 Pct.	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Firms selling nothing	50.00	81.82	80.00	80.00	72.22	72.73	100.00	57.14	75.00

Source: Eighth Edition (1981) of ASIA's *Analysis of Manufacturers and Remanufacturers Sales Costs, Performance and Distribution.* [1]Eight groups in table are based on annual sales volume. Groups are: 1—Under $1,000,000; Group 2—$1,000,000 to $3,000,000; Group 3—$3,000,000 to $5,000,000; Group 4—$5,000,000 to $10,000,000; Group 5—$10,000,000 to $25,000,000; Group 6—$25,000,000 to $50,000,000; Group 7—$50,000,000 to $100,000,000; Group 8—Over $100,000,000.

Vehicle Production Milestones[1]

(Cars, Trucks & Buses Combined)

100 millionth	1948
150 millionth	1955
200 millionth	1962
250 millionth	1968
300 millionth	1972
350 millionth	1977
375 millionth	1979

Source: Motor Vehicle Manufacturers Association of the United States, Inc.
[1]Based upon U.S. total factory sales data.

Canadian-United States Trade In Automotive Products, 1976-81

(In Millions)

UNITED STATES IMPORTS FROM CANADA[1]	1976	1977	1978	1979	1980	1981	Percent Change 80 to 81
Cars	$3,430	$4,032	$4,723	$4,345	$4,452	$5,145	15.6%
Trucks, etc.	1,344	1,964	2,557	2,236	2,218	3,142	41.7%
Parts	2,942	3,721	4,519	4,570	3,405	4,151	21.9%
Tires & Tubes	163	144	192	234	231	286	23.8%
TOTAL	7,879	9,861	11,991	11,385	10,306	12,724	23.5%
CANADIAN IMPORTS FROM UNITED STATES							
Cars	2,320	2,825	2,987	3,747	3,388	3,710	9.5%
Trucks, etc.	970	1,123	1,326	1,952	1,217	1,347	10.7%
Parts	5,474	6,847	8,087	8,659	7,599	9,230	21.4%
Tires & Tubes	115	153	129	155	145	165	13.0%
TOTAL	8,879	10,948	12,529	14,513	12,349	14,452	17.0%
BALANCES							
Cars	1,109	1,207	1,736	598	1,064	1,435	35.0%
Trucks, etc.	374	841	1,231	284	1,001	1,795	79.3%
Parts	—2,532	—3,126	—3,568	—4,089	—4,194	—5,079	—21.1%
Tires & Tubes	48	— 9	63	79	86	121	41.0%
TOTAL	1,000	—1,087	— 538	—3,128	—2,043	—1,728	— 0.8%
EXCLUDED: Retroactive adjustments to value of imported parts from U.S. for special tooling charges				234	288	218	

Source: External Trade Division of Statistics Canada. [1]A more accurate measurement of trade in automotive products is obtained by comparing the import statistics of each country. Accordingly, Canadian exports are derived from the counterpart United States statistics of imports.

Milestones In Production Of Motor Trucks and Buses

100,000th	1915
500,000th	1918
1 millionth	1920
5 millionth	1929
10 millionth	1938
25 millionth	1953
50 millionth	1971
75 millionth	1979

Source: Motor Vehicle Manufacturers Association of the United States, Inc.

Regional Automotive Show Statistics

Eastern Automotive Service Industries Show

Year	Place	Exhibitors	Booths	Net Square Ft. (Booth Space)	Total Attendance
1970	Atlantic City	243	498	49,800	10,571
1973	Atlantic City	362	730	73,850	13,957
1976	Atlantic City	417	819	83,600	15,615
1979	Atlantic City	556	960	119,200	16,043
1982	Atlantic City	589	1,215	121,150	17,266

New England Automotive Show

1975	Woburn, Mass.	231	306	33,500	18,553
1978	Woburn, Mass.	265	365	65,000	17,685
1980	Woburn, Mass.	255	360	100,000	13,016

Pacific Automotive Show

1972	San Francisco	282	531	53,100	9,459
1973[1]	Las Vegas	559	1,579	157,900	25,190
1974	Los Angeles	332	680	68,000	10,071
1975	Anaheim	301	550	55,000	10,226
1976[1]	San Francisco	560	1,525	152,500	21,795
1977	Las Vegas	323	670	67,000	8,998
1978	San Francisco	311	661	66,100	9,061
1979[1]	Las Vegas	746	2,016	201,600	28,237
1980	Anaheim	341	742	74,200	11,086
1981	San Francisco	322	696	69,600	9,069
1982[1]	Las Vegas	756	2,035	203,500	27,480

Southern Automotive Show

1972	New Orleans	288	515	51,500	8,928
1973	New Orleans	276	386	38,600	7,971
1974	Atlanta	326	449	44,900	11,273
1975	Memphis	250	430	43,000	7,976
1976	Dallas	331	583	58,300	6,971
1977	Atlanta	433	766	76,600	9,073
1978	Dallas	409	734	73,400	8,486[2]
1979	Atlanta	376	711	71,100	7,359
1980	Dallas	306	495	49,500	5,921
1981	Atlanta	213	347	34,700	3,956

Sources: Hall-Erickson, Inc. (producer of the Eastern Show); New England Regional Automotive Show (producer of the Northeast Automotive Show); Pacific Automotive Show, and Southern Automotive Show. [1]The 1973, 1976, 1979 and 1982 figures relate to PAS-IASI Shows, which involve greater participation by exhibitors and visitors. [2]This is a "registration" figure as distinguished from a "verified attendance figure." The latter is a count of people who actually pick up badge holders at a show.

Milestones In Production Of Cars[1]

Units	Year
1 millionth	1912
10 millionth	1920
50 millionth	1935
100 millionth	1952
150 millionth	1960
200 millionth	1967
250 millionth	1972
300 millionth	1979

Source: Motor Vehicle Manufacturers Association of the United States, Inc.
[1]Based upon U.S. total factory sales data.

Latest Financial Rankings Of

Automobile Parts—Miscellaneous

Figures Apply to 1980 With Certain Exceptions, As Noted

REVENUES ($ MILL.)

RANK	COMPANY	AMOUNT
1	Federal-Mogul Corp.	721.20
2	Bearings, Inc.	357.40
3	Allen Group, Inc.	348.50
4	Amerace Corp.	326.40
5	Echlin Manufacturing	301.40
6	Guardian Industries Corp.	299.10
7	Raybestos-Manhattan, Inc.	274.40
8	Sealed Power Corp.	257.90
9	General Automotive	240.10
10	Lamson & Sessions Co.	235.00
11	Standard Products Co.	229.00
12	NAPCO Industries	226.00
13	Twin Disc, Inc.	210.30
14	Hayes-Albion Corp.	184.40
15	Modine Manufacturing Co.	180.80
16	Wynn's International, Inc.	173.70
17	Warner Electric Brake	152.40
18	Intermark, Inc.	139.90
19	Facet Enterprises, Inc.	134.20
20	Sparton Corp.	126.60
21	Standard Motor	125.90
22	Simpson Industries, Inc.	121.20
23	Kysor Industrial Corp.	119.80
24	Douglas & Lomason Co.	91.60
25	Trico Products Corp.	89.00
26	Cascade Corp.	87.50
27	Champion Parts	79.70
28	Republic Automotive	78.90
29	LSB Industries	70.60
30	Arrow Automotive	66.10
31	D. A. B. Industries	53.30
32	Superior Industries	50.00
33	Hastings Manufacturing	47.00
34	Braun Engineering Co.	44.60
35	Redlaw Industries Inc.	34.50
36	Bomaine Corp.	22.30
37	Howell Industries, Inc.	20.10[3]
38	SFM Corp.	18.10
39	Metex Corp.	15.70

NET INCOME ($ MILL.)

RANK	COMPANY	AMOUNT
1	Federal-Mogul Corp.	36.70
2	Guardian Industries Corp.	28.30
3	General Automotive	14.60
4	Bearings, Inc.	14.20
5	Sealed Power Corp.	11.80
6	Warner Electric Brake	10.40
7	Amerace Corp.	10.10
8	Allen Group, Inc.	8.80
8	Echlin Manufacturing	8.80
10	Twin Disc, Inc.	8.60
11	Wynn's International, Inc.	7.60
12	Modine Manufacturing Co.	7.40
13	Sparton Corp.	7.30
14	Simpson Industries, Inc.	5.90
15	Standard Products Co.	5.70
16	Cascade Corp.	5.60
17	NAPCO Industries	5.20
18	Intermark, Inc.	3.40
19	Kysor Industrial Corp.	3.30
19	Standard Motor	3.30
21	Trico Products Corp.	2.90
22	Republic Automotive	2.40
23	Bomaine Corp.	1.70
24	LSB Industries	1.60
25	Hastings Manufacturing	1.40
26	Arrow Automotive	1.00
27	SFM Corp.	0.40
28	Douglas & Lomason Co.	0.30
28	Metex Corp.	0.30
30	Champion Parts	0.20
31	Howell Industries, Inc.	0.10[3]
32	Redlaw Industries Inc.	[4]0.68
33	Braun Engineering Co.	[4]0.70
34	D. A. B. Industries	[4]1.40
35	Hayes-Albion Corp.	[4]2.90
36	Lamson & Sessions Co.	[4]3.00
37	Facet Enterprises, Inc.	[4]3.90
38	Superior Industries	[4]5.20
39	Raybestos-Manhattan, Inc.	[4]6.30

Automobile Parts—Major (1981)

REVENUES ($ MILL.)

RANK	COMPANY	AMOUNT
1	Bendix Corp.	4,425.40
2	Eaton Corp.	3,165.30
3	Borg-Warner Corp.	2,761.20
4	Dana Corp.	2,711.10
5	Cummins Engine Co., Inc.	1,962.50
6	Genuine Parts Co.	1,584.60
7	Timken Co.	1,427.20
8	Libbey-Owens-Ford Co.	1,226.50
9	Champion Spark Plug Co.	818.60
10	Smith (A.O.) Corp.	783.70
11	Sheller-Globe Corp.	512.10
12	Arvin Industries, Inc.	495.10
13	Acklands Ltd.	332.20

NET INCOME ($ MILL.)

RANK	COMPANY	AMOUNT
1	Bendix Corp.	204.50
2	Borg-Warner Corp.	172.10
3	Dana Corp.	115.60
4	Timken Co.	101.10
5	Cummins Engine Co., Inc.	100.00
6	Eaton Corp.	82.40
7	Genuine Parts Co.	77.50
8	Champion Spark Plug Co.	30.30
9	Sheller-Globe Corp.	17.60
10	Arvin Industries, Inc.	12.40
11	Libbey-Owens-Ford Co.	11.80
12	Smith (A.O.) Corp.	5.40
13	Acklands Ltd.	1.70

Publicly-Owned Automotive Firms

Automobile Parts—Miscellaneous

Figures Apply to 1980 With Certain Exceptions, As Noted

OPERATING PROFIT MARGIN (%)

RANK	COMPANY	AMOUNT
1	Bomaine Corp.	17.40
2	Guardian Industries Corp.	14.90
3	Warner Electric Brake	12.80
4	Cascade Corp.	12.20
5	General Automotive	11.90
6	Federal-Mogul Corp.	10.90
7	Sparton Corp.	10.70
8	Twin Disc, Inc.	9.80[1]
9	Intermark, Inc.	9.30
10	Simpson Industries, Inc.	8.70
11	Sealed Power Corp.	8.60
12	Wynn's International, Inc.	8.40
13	Bearings, Inc.	8.10
14	SFM Corp.	7.40
15	Echlin Manufacturing	6.80
16	Republic Automotive	6.60
17	Amerace Corp.	6.50
17	Kysor Industrial Corp.	6.50
19	Allen Group, Inc.	6.10
20	Standard Motor	5.30
21	NAPCO Industries	5.20
22	LSB Industries	4.80
23	Hastings Manufacturing	4.50
24	Champion Parts	3.30
25	Modine Manufacturing Co.	2.90
26	Arrow Automotive	2.60
27	Douglas & Lomason Co.	1.00
27	Lamson & Sessions Co.	1.00
29	Raybestos-Manhattan, Inc.	0.70
30	Braun Engineering Co.	0.40
31	Standard Products Co.	0.20[1]
32	D.A.B. Industries	....
32	Facet Enterprises, Inc.	....
32	Hayes-Albion Corp.	....
32	Howell Industries, Inc.	....
32	Metex Corp.	....
32	Redlaw Industries Inc.	....
32	Superior Industries	....
32	Trico Products Corp.	....
	Average	5.50

RETURN ON CAPITAL (%)

RANK	COMPANY	AMOUNT
1	Sparton Corp.	19.11
2	General Automotive	17.50
3	Simpson Industries, Inc.	14.85
4	Warner Electric Brake	13.81
5	Cascade Corp.	12.52
6	Bearings, Inc.	11.99
7	Guardian Industries Corp.	10.84
8	Twin Disc, Inc.	10.45[1]
9	Bomaine Corp.	9.71
10	Federal-Mogul Corp.	8.58
11	Wynn's International, Inc.	8.32
12	Republic Automotive	7.92
13	Sealed Power Corp.	7.73
14	NAPCO Industries	7.47
15	Hastings Manufacturing	7.03
15	Modine Manufacturing Co.	7.03
17	Allen Group, Inc.	6.47
18	Amerace Corp.	5.85
19	Kysor Industrial Corp.	5.04
20	Standard Motor	4.77
21	LSB Industries	4.43
22	Intermark, Inc.	4.42
23	Echlin Manufacturing	4.40
24	SFM Corp.	4.31
25	Arrow Automotive	3.04
26	Metex Corp.	2.98
27	Douglas & Lomason Co.	0.83
28	Champion Parts	0.47
29	Braun Engineering Co.	....
29	D. A. B. Industries	....
29	Facet Enterprises, Inc.	....
29	Hayes-Albion Corp.	....
29	Howell Industries, Inc.	....
29	Lamson & Sessions Co.	....
29	Raybestos-Manhattan, Inc.	....
29	Redlaw Industries Inc.	....
29	Standard Products Co.	....
29	Superior Industries	....
29	Trico Products Corp.	....
	Average	5.70

Automobile Parts—Major (1981)

OPERATING PROFIT MARGIN (%)

RANK	COMPANY	AMOUNT
1	Timken Co.	14.00
2	Genuine Parts Co.	9.70
3	Champion Spark Plug Co.	9.20[2]
4	Dana Corp.	7.90
5	Acklands Ltd.	7.10[2]
6	Bendix Corp.	6.50
7	Eaton Corp.	6.30
8	Sheller-Globe Corp.	5.90
9	Borg-Warner Corp.	5.20[2]
10	Libbey-Owens-Ford Co.	5.05
11	Arvin Industries, Inc.	4.00[2]
12	Cummins Engine Co., Inc.	2.00[3]
13	Smith (A.O.) Corp.	1.80
	Average	6.50

RETURN ON CAPITAL (%)

RANK	COMPANY	AMOUNT
1	Genuine Parts Co.	16.84
2	Timken Co.	11.35
3	Borg-Warner Corp.	9.24[2]
4	Bendix Corp.	9.08
5	Champion Spark Plug Co.	7.92[2]
6	Dana Corp.	7.68
7	Sheller-Globe Corp.	6.51
8	Acklands Ltd.	4.77[2]
9	Eaton Corp.	3.75
10	Arvin Industries, Inc.	2.98[2]
11	Libbey-Owens-Ford Co.	1.72
12	Smith (A.O.) Corp.	1.64
13	Cummins Engine Co., Inc.	....
	Average	6.40

Source: Moody's Investor Fach Sheets (December 4, 1981 and May 7, 1982), published by Moody's Investors Service, Inc. [1]Figures apply to 1979. [2]Figures apply to 1981. [3]Figures apply to 1980. [4]Signifies net loss.

'80 Truck & Trailer Registration

	COMMERCIAL TRAILERS[1]					
	Full Trailers	Semi-Trailers	Total Truck Trailers	Truck Tractors[2]	Diesel Trucks[2,3]	Diesel Buses[3]
Alabama	—	47,373	47,373	24,059	28,870	1,565
Alaska	4,544	1,498	6,042	2,048	4,018	618
Arizona	12,851	39,881	52,732	10,022	18,192	689
Arkansas	—	29,839	29,839	17,846	14,104	38
California	208,628	212,163	420,791	70,813	120,111	10,206
Colorado	9,010	22,470	31,480	7,795	14,232	446
Connecticut	—	20,672	20,672	6,733	12,708	1,738
Delaware	27	9,944	9,971	9,051	6,806	315
Florida	14,912	79,583	94,495	64,726	68,621	2,881
Georgia	—	64,118	64,118	33,464	39,321	1,153
Hawaii	337	524	861	1,498	2,209	1,555
Idaho	3,332	7,526	10,858	5,170	8,820	265
Illinois	16,555	101,784	118,339	76,901	48,482	5,838
Indiana	5,230	66,282	71,512	45,779	49,203	3,918
Iowa	7,400	44,300	51,700	28,184	32,939	885
Kansas	17,593	52,027	69,620	19,159	22,751	364
Kentucky	—	42,764	42,764	15,437	19,581	500
Louisiana	—	141,759	141,759	33,390	36,496	1,145
Maine	—	265,955	265,955	6,963	7,156	191
Maryland	72	19,994	20,066	16,547	21,658	2,280
Massachusetts	—	54,754	54,754	27,377	25,271	3,536
Michigan	9,431	101,504	110,935	66,464	48,971	2,418
Minnesota	8,249	102,768	111,017	21,929	24,853	1,780
Mississippi	—	22,088	22,088	12,550	17,004	936
Missouri	4,310	79,363	83,673	41,858	33,388	840
Montana	3,543	18,712	22,255	15,338	4,270	212
Nebraska	11,453	29,984	41,437	16,129	21,149	460
Nevada	1,570	3,221	4,791	2,737	3,421	249
New Hampshire	—	9,426	9,426	4,843	4,439	285
New Jersey	115	48,447	48,562	25,340	30,741	4,168
New Mexico	6,141	20,380	26,521	7,633	7,997	497
New York	—	59,001	59,001	45,039	47,550	12,501
North Carolina	—	89,430	89,430	58,451	35,665	1,611
North Dakota	257	11,154	11,411	6,940	5,570	55
Ohio	23,166	111,214	134,380	95,055	79,640	5,937
Oklahoma	3,850	61,574	65,424	34,893	22,598	292
Oregon	18,296	36,527	54,823	26,356	19,418	970
Pennsylvania	2,934	155,127	158,061	78,677	78,354	7,820
Rhode Island	—	15,520	15,520	6,137	3,503	284
South Carolina	5,140	24,602	29,742	18,063	15,717	823
South Dakota	778	15,212	15,990	5,727	7,236	274
Tennessee	—	38,298	38,298	30,638	31,979	1,544
Texas	—	223,361	223,361	143,180	105,529	2,692
Utah	1,335	6,603	7,938	6,364	8,183	278
Vermont	75	1,980	2,055	1,294	1,869	76
Virginia	—	53,375	53,375	21,731	24,829	2,105
Washington	10,033	138,690	148,723	37,574	24,090	408
West Virginia	4,592	11,940	16,532	9,796	11,972	983
Wisconsin	9,989	45,246	55,235	26,672	21,018	1,382
Wyoming	5,728	20,604	26,332	10,302	6,868	1,025
District of Columbia	—	655	655	424	424	2,107
Total	431,476	2,881,216	3,312,692	1,401,596	1,349,797	95,138

Source: U.S. Federal Highway Administration. [1]The reporting of data on trailer registration varies greatly. Data are reported to the extent available. [2]In these classifications a vehicle may be included more than once; a diesel truck tractor could appear in both columns. [3]Includes butane and other special fuels. Number of buses given here are estimates by Federal Highway Administration of number in operation—rather than registration counts of the states. Note: This table excludes publicly owned vehicles. The registrations shown here are not synonymous with vehicles in use. The latter expression implies a count of vehicles in operation on a specific date or an average number of vehicles in operation over a period of time. Registrations, by contrast, are a count of transactions (license sales with transfers eliminated) during a specified period.